Trade and Industry

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Trade and Industry

2 July 1976

News from the Departments of Industry·Trade·Prices & Consumer Protection

Our special report on Wales brings a welcome from the Secretary of State for Wales, the Welsh Office, businessmen, industrialists, the trade unions, the CBI – and two ladies who like living in the Principality.

Trade and Industry

Incorporating the Board of Trade Journal

Volume 24. No. 1.

Pages 1 to 64. 2 July 1976.

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Subscriptions: HMSO, PO Box 569, London SE1.
01-928 6977 ext. 472

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ABC

Home News

Government proposals for changes to Price Code 2
Overseas ministers visit Department of Industry 3
Eric Varley spells out strategy for UK shipbuilding's future 3
Two more advance factories in north-east . . . 4
. . . and four for Doncaster 4
'Utilisation of steam for process and heating' 4
Coal industry's £300m investment programme 4
Europe's most modern car plant 5
Committee on Policy Optimisation 6
Average retail food prices 6
Clearance of merger proposals 8
Small Claims Procedure 8
Airports strategy for Great Britain 10
Renegotiation of Bermuda Air Services Agreement 12
Prevention of oil pollution around UK 12
The registration of submersibles 13
Further diving safeguards announced 13
Patents endorsed 'Licences of Right' 13

Technology News

Coal research benefits from collaboration 14
'Reliability assessment – theory and practice' 14
Safety testing of dusts and gases 14
Circuits and systems – call for papers 14
New medical isotope 15
Monitoring tunnel boring for Kielder water scheme 15
New die ripping machine 15
Teaching how to survey from space 15

Parliament

16

Government Sales

21

Publications

23

European Community News

Trade provisions of EEC's Maghreb agreements enter into force 24
EEC growth target of 5 per cent 1976-80 25
Appointment of EIB management committee 25
Agreement reached on imports of NZ butter 25
European social fund allocations in 1976 25
EEC regulation on drivers' hours deferred 25
New EC legislation 26
Wheat, barley and oats: guarantee arrangements ended 26
Commission to create equal opportunities bureau 26
Suspension of CCT on aircraft parts 26
EEC aid for UK coal and steel firms 26
Economic indicators of the EEC 27

Missions and Tours

32

'Trade and Industry' special report

Welcome to Wales 1-16

BOTB News

BOTB's practical help for exporters 33

Exhibitions and Fairs

Second light industry exhibition in Moscow 34
Optimistic participants at Bergbau 34
British firms at Achema 35
Award for well-designed and business-like stand 36
British stamp dealers and exhibitors at Interphil 36

Trade Information

Brazil: Among the top five for international investment 37
Edmund Dell welcomes renewal of OECD Trade Pledge 38
Import Duties Orders 38
Revocation of anti-dumping duty on moving eyes for dolls from USA 38
Quota for exports under licence of non-alloy ferrous scrap to countries outside EEC 38
Singapore Paya Lebar Airport 38

Tariff and Trade Notices

Brazil 43, Colombia 43, Greece 40, Iceland 39, Italy 39, Malta 40, Mozambique 40, New Zealand 40, United States 43

Statistics

The economy: selected indicators 44
Made-up clothing: orders and deliveries 45
Overseas trade analysed in terms of industries: 1975 45
Business Monitors 45
Footwear industry: orders, deliveries and stocks 46
Steel consumption and stocks 47
Activity in the chemicals industry 50
Cinema admissions in March 53
Registrations of British, community and foreign films 53
Index of retail sales, Northern Ireland 53
National Food Survey: household food consumption 54
Food supplies moving into consumption 56
Index to statistics 58

Home News

Government proposals for changes to Price Code

The Government's proposals for changes in the Price Code have been published in a White Paper* presented to Parliament by the Secretary of State for Prices and Consumer Protection, Shirley Williams.

The main changes are as follows:

1 an increase from 20 per cent to 35 per cent in the rate in investment relief (that is, the proportion of the costs of new investment which may be reflected in current prices);

2 new provisions relating to the depreciation of assets and to the appreciation of stocks which go some way to offset the damaging effects of inflation;

3 redefinition of the categories into which firms fall, so as to take account of inflation;

4 measures to moderate the present disincentive effect of the Code on saving costs and increasing output, including the abolition of the productivity deduction;

5 other measures including those to reduce the administrative burden on companies of operating the Code.

The Price Code, which is to operate in the 12 months from 1 August, will continue to control both price increases, which must be based on increases in costs, and profit margins. But if firms are to raise the funds they need to increase their investment and output, and to strengthen employment, changes in the existing Price Code are necessary. The Prime Minister indicated the broad lines of the Government's proposals in his speech on 18 May to the CBI.

The Code affects different firms in different ways – even firms in the same line of business can be affected differently. The proposed changes offer a number of options which firms can adopt in their pricing, according to where they stand under the Code and their judgment of conditions in the market. Allowing for the slow recovery of the domestic market which makes it difficult and in some cases impossible to increase prices even when such increases are allowed by the Code, the Government estimates that the effect of the proposed changes will be to add about 1 per cent to the RPI over the coming 12 months

Summary of proposed changes

1 *Investment relief*

The investment relief which the Government introduced in December 1974 on planned expenditure on factories plant and machinery will be extended. The rate of relief will go up from 20 per cent to 35 per cent. In addition, the relief is to be applied for the first time to cover expenditure by retailers on the construction of shops.

Price Commission monitoring ensures that their relief is applied only to investment in domestic manufacturing and service industry and in distribution, and not to property and overseas investment.

2 *Depreciation and stocks*

To encourage adequate provision by firms to replace their existing assets, there will be a change in the Price Code rule for calculating depreciation. In a period of inflation, the historic cost method of accounting often means that a firm does not put enough by to renew its assets when they have to be replaced. As an interim step, a general marking-up by 30 per cent of historic depreciation charges will be permitted.

A new stock relief will be added to the Code, so that in profit controls 70 per cent of the increases in stock values will be disregarded.

Both the depreciation and stock relief changes will be monitored by the Price Commission to ensure that they are not abused.

3 *Categories*

Because of inflation the number of firms required to report to the Commission has increased far beyond the number brought in when the control began. The reporting categories are to be adjusted and the number of firms in the categories will be reduced but the rules of the Code continue to apply to all firms except those expressly excluded.

4 *Expanding output*

There are new incentives for firms which increase output or cut costs. Under the present code, an expansion in output reduces a company's unit overhead costs and this must be taken account of in prices. Economies due to better use of capacity will in future be shared 50/50 between improving the return to the firm and restraining prices. There will be a similar split of the cost benefits going to those firms which increase the share of their output that goes to exports. Alongside this new sharing out of the economies of higher output, the Government has decided to remove the productivity deduction which disallows 20 per cent of any increase in labour costs and can have unfavourable effects on employment.

As a special incentive to the more economical use of fuel, any actual reduction in the unit output cost of fuel may be retained in full by the firm. But any reduction in the unit cost of materials will have to be passed on in full in lower prices, as at present.

5 *Other measures*

1 Minor price increases of up to 2 per cent over the year need not in future be prenotified to the Price Commission, but will otherwise still be subject to the Code rules.

2 There will be some improvement in the safeguards set by the Price Code for firms whose profits are low or falling, both in manufacturing and in distribution.

3 The Price Code will in addition be made clearer at various points. The extent to which manufacturing and service firms may allocate price rises among their different products will continue to be strictly controlled.

4 The date from which unrecovered retrospective costs can be reclaimed will be moved forward from 1 November 1973 to 1 January 1975.

Nationalised industries

The existing controls over nationalised industry prices are being maintained. These industries will be eligible for the proposed depreciation and stock relief but, as at present, not for investment relief. Ministers will retain the power to cut back proposed price increases but nationalised industries will be allowed price increases which they may need to break even.

Consultation

The White Paper proposals are published for comment and consideration. The Government is required by Section 2 of the Counter-Inflation Act 1973 to consult widely before amending the Price Code.

The White Paper is being sent out to representatives of consumers, commerce and industry including over 100 trade organisations. All comments will be carefully considered by the Government in coming to final decisions on the new Code.

Comments should reach the Department of Prices and Consumer Protection as soon as possible, and not later than Friday, 16 July 1976 at the following address: Prices Policy Division, Department of Prices and Consumer Protection, Room 538, 1 Victoria Street, London SW1H 0ET. Inquiries by telephone should be addressed to 01-215 5057 or 5743.

* Modifications to the Price Code: a Consultative Document, Cmnd. 6540, published by HMSO, price 75p.

Overseas ministers visit Department of Industry

Two ministers from overseas last week visited the Department of Industry's headquarters at Victoria Street London. Left: On 21 June Ing. L. Supka, (left) the Czechoslovak Minister for Technology and Investment Development, called on Eric Varley, Secretary of State for Industry. Right: On 23 June Peter Nixon, (right) Australia's Transport Minister was the guest of Gerald Kaufman, Minister of State.

Eric Varley spells out strategy for UK shipbuilding's future

The three main elements of the Government's strategy for an efficient and competitive shipbuilding industry have been spelled out by Eric Varley, Secretary of State for Industry. They are: securing more orders; building on its strengths through nationalisation; international co-operation.

Mr. Varley told delegates at the Confederation of Shipbuilding and Engineering Unions Conference in Torquay on 23 June.

'First, we are going to do everything we can to try and secure more orders. Britain has suffered along with everybody else and worse than many. In the past 18 months or so our yards have taken orders for only 320,000 tons or an average of about 230,000 tons a year, about 20 per cent of our normal annual output in recent years.

'Any what we are witnessing now is not a short-term cyclical recession; it is far more serious than that. Already the equivalent of something like two years' production is laid up. Even when the world market in oil is expanded again to mop up this vast surplus, perhaps in five years time, orders for new tanker tonnage will resume at little more than a trickle. We are facing not a short-term recession, but a major structural change in demand which will last for very many years.

'Second, through the nationalisation of the industry we will give ourselves a chance to build on its strengths, and to create a modern and efficient industry which will concentrate on those sectors of the market in which it is most competitive and which will be able to survive and prosper.

'Third, the problem of shipbuilding is not one confined to this country, even though some aspects are peculiar to the United Kingdom. It is basically an international problem. An international problem must have an international solution. One that is as fair and as equitable as it possibly can be. One that is acceptable to everybody. The OECD is doing the best it can to promote such agreement and we and our partners in the common market are playing a leading role.

'No Government is going to shrug its shoulders and allow its shipbuilding industry to disappear in order to be able to say that it has upheld the principles of free competition. International agreement on how to deal with the world shipbuilding crisis is going to need hard decisions by all concerned and it will take a long time to get.

'We shall fight to maintain our fair share of the market, and we are prepared to introduce measures to enable the industry to do so. At the same time we must not endanger the chances of securing a fair and equitable international agreement. So we cannot therefore indulge in indiscriminate subsidies or in measures which will make the world situation worse. It is a tightrope situation. We are determined to maintain a healthy and viable industry.'

Mr. Varley then made it clear that the problems cannot be solved by government action alone. 'Whatever action is taken,' he said, 'must be taken with your agreement and support, and of course that of the Organising Committee for British Shipbuilders. So I want to examine urgently with all concerned, including your Confederation and the Organising Committee, what steps should be taken to deal with the very difficult problems of the industry, facing as it does the situation resulting from the drop in the scale of world-wide orders. Without such action, the problems will simply continue to get worse for all of us. I want to set up these discussions early next month . . . The challenge is very great but for the first time for many years we have a chance to bring about a viable industry. These urgent talks will be our next step to meet that challenge. And I know that I can count on the full support of the Confederation.'

A Honeywell System 700 minicomputer system leaving Hemel Hempstead for Godorf, near Cologne. The system is to take over the monitoring and control of a 400-mile Rotterdam to Ludwigshafen pipeline which carries some 15 different mineral oil products from users' refineries to a number of area distribution depots along its route. The new £300,000 system will be located at Godorf where the pipeline operator, RMR (Rhein Main Rohrleitungstransport-Gesellschaft mbH), will use it for data acquisition and supervisory control purposes. Honeywell's systems centre at Hemel Hempstead was responsible for the design of the three-processor configuration and John Todhunter, project manager at Honeywell, is to direct its installation at Godorf.

Two more advance factories in the north east . . .

Two more advance factories for the Department of Industry in north east England are planned by the English Industrial Estates Corporation.

R. M. Douglas Construction Ltd. of Stockton have been awarded a contract worth over £200,000 to build a 2,250m² (25,000 sq. ft) factory on the Sedgeletch Industrial Estate, Houghton-le-Spring. Architects for the project are Fennell and Baddiley of Chester le Street and quantity surveyors are Davis Belfield and Everest of Gateshead.

A similar unit of 2,250m² (25,000 sq. ft) is to be built at Tanfield Lea, Stanley, by A. Lax and Sons Ltd. of Crook under a contract worth about £218,000. Architects are Hayton Lee and Braddock of Durham and quantity surveyors are Davis Belfield and Everest of Gateshead.

Work is expected to start on both factories in the next few weeks and they should be ready for occupation in the spring of 1977.

Inquiries regarding purchase or lease should be made to: Regional Director, Department of Industry, Northern Region, Wellbar House, Gallowgate, Newcastle upon Tyne NE1 4TR (tel. Newcastle (0632) 27575).

. . . and four for Doncaster

Work is about to start on four more advance factories for the Department of Industry on the Shaw Lane Industrial Estate, Doncaster. Two of these are units of 450m² (5,000 sq. ft) and the others are 900m² (10,000 sq. ft) and 1,350m² (15,000 sq. ft) respectively.

A contract worth about £350,000 which includes associated site development works, has been awarded to Quibell and Son Ltd. of Doncaster. Architects are Abbey and Hanson Rowe and Partners of Huddersfield and quantity surveyors are Turner and Townsend of Leeds.

Work is expected to start at the end of June and the premises should be ready for occupation by March 1977.

Inquiries regarding purchase or lease should be made to: Regional Director, Department of Industry, Yorkshire and Humberside Region, Priestley House, 1 Park Row, Leeds LS1 5LF (Tel. Leeds (0532) 443171.

'Utilisation of steam for process and heating' – new booklet

The careful way in which steam is generated and the careless way in which it is often used, are contrasted in a new Department of Energy booklet*.

This leads to waste of fuel and money, the booklet notes, stating: 'No doubt if production people realised this important fact more clearly, they would be more anxious to use efficiently the steam provided for them by the boiler plant.'

Explaining why steam is used for heating and process work, the publication says: 'Steam is simply a carrier of heat: it is a good way of conveying the heat from the fuel which is being burned in the boiler furnace to the place where we want to use that heat.

'Steam is chosen as a good conveyor of heat for two reasons: firstly, because it is generated from water which is usually available; secondly, because it is able to store and carry a large quantity of heat at a temperature at which it can be conveniently used.'

The booklet illustrates the principles of steam generation, steam usage and heat transfer: it is upon an understanding of these, it says, that economy depends. It also outlines measures to minimise heat loss, when steam leaves the boiler, through faulty valves and joints, as well as by inadequate lagging and radiation from uncovered surfaces.

* 'Utilisation of Steam for Process and Heating', Fuel Efficiency booklet No. 3, available free from: Library, Department of Energy, Thames House South, Millbank, London SW1P 4QJ, tel. 01-211 3394.

Coal industry's £300m investment programme

The National Coal Board is making their biggest-ever capital investment in Britain's mining industry this year – a total of nearly £300 million, which is two-and-a-half times more than the level of two years ago. This was revealed on 23 June by Sir Derek Ezra, NCB chairman, when he visited the North Derbyshire coalfield to announce one of the biggest projects – an £18 million coal output reconstruction scheme at Shirebrook colliery.

He said the total investment programme in 1976/77 throughout the coal industry includes 110 projects each costing over £½ million. The programme covers: £175 million on mining schemes to open up further coal reserves – particularly coking coal essential for the steel industry; £80 million on underground equipment; £15 million on coal exploration for existing and new mines; and £30 million on other schemes, including extensions to research facilities.

'This major investment programme safeguards mining jobs, creates other employment in Britain, and strengthens the economy,' said Sir Derek. 'It is also essential that investment continues on a major scale so that the coal mining capacity is available to ensure that Britain does not face an energy shortage later this century when North Sea resources may have passed their peak.'

The Shirebrook project is the biggest colliery reorganisation in the NCB's North Derbyshire Area. Output will be increased from the present 1 million tons a year to 1.64 million tons by 1980. It will offset the loss by exhaustion by 1978 of output from nearby Langwith Colliery so that the area's present total yearly output of about 8 million tons will be maintained.

The scheme involves the development of the Tupton seam to provide more coalfaces; the construction of a new surface drift – a sloping tunnel from the pit top to the workings – to help get more coal to the surface faster; and the installation of a new washery with storage facilities.

A feature of the expansion at Shirebrook will be the need for more skilled mineworkers and it is planned that the additional manpower will come from Langwith Colliery. Shirebrook's present workforce of 1,560 will be built up gradually to almost 2,000 by the end of the decade.

Europe's most modern car plant

The huge new Leyland Cars factory, above, at Solihull in the West Midlands, probably represents Britain's biggest single investment in motor car manufacture since the end of the 1940s. Part of a total investment of almost £95 million, which includes the design and development of the new Rover 3500 announced on Wednesday, 30 June, the plant will make a significant contribution to UK balance of payments as well as to national and local economies. Within an area of 100 acres are nearly half a mile of single storey assembly hall, a three-tier paint shop, ancillary buildings, services, car parks, despatch areas and three miles of roadway. Total cost of the facilities was £31 million of which £4 million was for vendor tooling.
The computer controlled paint shop is one of the largest in Europe. The plant receives the bodies-in-white for storage at ground level. Pre-treatment, body preparation and paint booths are on the first floor. The top floor houses stoving ovens, fresh air replacement plant and fume eliminating incineration equipment. Fast moving lifts connect the line conveyors between floors. To begin with the complex is making the new Rover 3500. This will be joined by the Triumph Dolomite range progressively during 1977. The plant through-put capacity is 3,000 cars a week.
Top left: dust-free, automatic spraying for the new Rover 3500. Top right: final finishing and valeting at the new factory.

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Committee on Policy Optimisation

The membership and terms of reference of the Committee on Policy Optimisation were announced in Parliament on 23 June by Robert Sheldon, Financial Secretary to the Treasury. Replying to a question from Dr. Jeremy Bray (Motherwell and Wishaw) Mr. Sheldon said: 'The terms of reference of this committee, which will be chaired by Professor R. J. Ball, Principal of the London Business School are: "To consider the present state of development of optimal control techniques as applied to macro-economic policy. To make recommendations concerning the feasibility and value of applying these techniques within HM Treasury".'

The membership of the committee will be:

Mr. J. A. Bispam – Economic Intelligence Department, Bank of England

Professor G. M. Jenkins – Visiting Professor of Statistics, London Business School

Dr. D. A. Livesey – Lecturer in Economics, Cambridge University

Professor J. A. Mirrlees – Professor of Economics, Oxford University

Mr. M. V. Posner – Deputy Chief Economic Adviser, HM Treasury

Professor J. D. Sargan – Professor of Econometrics, London School of Economics

Mr. G. D. N. Worswick – Director, National Institute of Economic and Social Research.

Notes

Professor Ball has made major contributions to applied economics, econometrics and development of macro-economic forecasting models. He has played a major role in the development of the LBS econometric forecasting model and was responsible for computerising the Treasury Short Term Economic forecast.

On 21 October 1975 (*Hansard* Cols WA 169-70) Dr. Bray asked the Chancellor of the Exchequer if he would make a statement on the publication of economic forecasts, access to the Treasury macro-economic model, and the undertaking of policy optimisation work in the Treasury. In his reply Edmund Dell, then Paymaster General, said that HM Treasury proposed to set up an advisory committee, under academic chairmanship, to consider the appropriate use of policy optimisation methods.

The Committee's report, which will probably take about a year to complete, will be published.

Average retail food prices in the United Kingdom on 18 May

Average retail prices of about 80 important food items on 18 May 1976 are shown in the table below. The Department of Employment collects these prices from 200 areas in the UK on one specific day each month for the General Index of Retail Prices. They come from between 500 and 1,000 retailers representative of those from whom the great majority of the population make their purchase. Many of the items vary in quality from retailer to retailer and partly because of these differences there are considerable variations in the prices charged for many items. An indication of these variations is given in the last column of the table, which shows the range of prices within which at least four-fifths of the recorded prices fell. The average prices are subject to sampling error.

The current figures will be published in the June 1976 issue of the *Department of Employment Gazette*. Prices since November 1967 have been published in earlier issues.

Average prices and price range (per lb unless otherwise stated)

Item	Average price p	Price range From p	Price range To p
Beef: home-killed			
Chuck	73.6	66	80
Sirloin (without bone)	112.8	90	140
Silverside (without bone)*	98.0	88	110
Back ribs (with bone)	67.5	56	80
Fore ribs (with bone)	66.0	56	80
Brisket (without bone)*	66.0	54	78
Rump steak*	130.1	110	150
Beef: imported chilled (b)			
Chuck			
Silverside (without bone)*			
Rump steak*			
Lamb: home-killed			
Loin (with bone)	91.5	74	110
Breast*	29.5	20	40
Best end of neck	69.0	40	90
Shoulder (with bone)	63.4	48	80
Leg (with bone)	86.4	70	100
Lamb: imported			
Loin (with bone)	64.8	58	72
Breast*	19.3	14	26
Best end of neck	53.1	38	64
Shoulder (with bone)	46.3	40	50
Leg (with bone)	68.7	64	74
Pork: home killed			
Leg (foot off)	65.3	54	80
Belly*	49.6	44	56
Loin (with bone)	79.8	70	88
Sausages			
Pork	40.3	34	46
Beef	35.7	30	40
Roasting chicken			
Broiler, frozen, 3 lb	31.6	28	36
Fresh or chilled, 4 lb (oven ready)	37.9	32	44
Fresh fish			
Cod fillets	62.2	54	70
Haddock fillets	66.9	56	78
Haddock, smoked, whole	64.4	50	75
Plaice fillets	77.0	65	90
Halibut cuts	122.7	80	150
Herrings	33.3	25	40
Kippers (with bone)	41.0	34	48
Fresh vegetables			
Potatoes, old, loose			
White	14.4	12	17
Red	14.7	12	18
Potatoes, new, loose	17.9	15	20
Tomatoes	36.1	30	42
Cabbage, greens	8.9	6	12
Cabbage, hearted	10.4	8	15
Cauliflower or broccoli	14.3	8	20
Brussels sprouts	—	—	—
Carrots	8.5	6	12
Onions	16.9	14	20
Mushrooms, per ¼ lb	12.0	10	14
Fresh fruit			
Apples, cooking	17.2	14	20
Apples, dessert	16.0	12	20
Pears, dessert	19.4	15	24
Oranges	14.3	10	18
Bananas	16.5	14	19
Bread			
White, 1½ lb wrapped and sliced loaf	17.4	15	18½
White, 1½ lb unwrapped loaf	18.2	16½	20½
White, 14 oz loaf	12.3	11	13½
Brown, 14 oz loaf	13.1	12½	14
Flour			
Self-raising, per 3 lb	20.1	17	24
Bacon			
Collar*	65.7	56	74
Gammon*	84.4	74	94
Middle cut, smoked*	78.9	70	90
Back, smoked	86.6	66	100
Back, unsmoked	83.3	62	98
Streaky, smoked	69.9	60	84
Ham (not shoulder)	111.3	92	128
Pork luncheon meat, 12 oz can	30.1	23	36
Canned (red) salmon, ¼-size can	74.4	65	85
Milk, ordinary, per pint	8.5	—	—
Butter			
New Zealand	40.5	38	44
Danish	42.2	38	46
Home produced	40.9	36	46
Margarine (a)			
Standard quality (without added butter)	23.8	22	26
Lower priced	22.2	21	24
Lard	19.5	16	23
Cheese, cheddar type	48.6	39	56
Eggs, per doz			
Large	45.8	42	50
Standard	42.5	38	47
Medium	39.0	36	43
Sugar, granulated, 2 lb	22.8	22	25
Instant coffee, per 4 oz	51.1	46	50
Tea, per ¼ lb			
Higher priced	12.9	12½	13
Medium priced	10.5	9½	12
Lower priced	9.5	9	10

* Or Scottish equivalent.
† Insufficient or no quotations.
(a) Now quoted at average price per lb.
(b) Imported, chilled beef discontinued from January 1976.

Source: Department of Employment.

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Clearance of merger proposals

Shirley Williams, Secretary of State for Prices and Consumer Protection, has decided on the information at present before her not to refer the following proposed mergers to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973:

Trafalgar House Investments Ltd./Clark and Fenn (Holdings) Ltd.;
International Combustion (Holdings) Ltd./ Thermal Syndicate Ltd.;
Edbro (Holdings) Ltd./Anthony Carrimore Ltd.

On the information at present available, the counter-offer by York Trailer Co. Ltd. for Anthony Carrimore does not constitute a merger situation which could be referred to the Monopolies and Mergers Commission under the provisions of the Act.

Finely balanced to rotate at speeds of up to 15,000 r.p.m. these 24 inch diameter ferralium alloy forgings are seen being tolerance checked between machining stages at the Slough factory of Langley Alloys, a member of the G.H.P. Group. Because of ferralium alloy's particularly high resistance to stress corrosion cracking it was chosen to replace failed sets of forgings made in ordinary ferritic stainless steel. With sections of 5½ inch and weighing around 400 lb each, they will be used in compressors handling hot gases containing hydrogen disulphide and sulphur dioxide in an overseas petrochemical complex.

Small Claims Procedures provides simple redress for man in the street

'The Small Claims Procedure has had considerable success in providing a simple, speedy and inexpensive solution to the smaller legal problems facing the consumer,' Robert Maclennan, Parliamentary Under-Secretary of State for Prices and Consumer Protection, said on 28 June. He was making the opening address at a seminar on Small Claims Procedures organised by the Institute of Trading Standards Administration in Birmingham.

Mr. Maclennan continued:

'Particulars of claim for every common form of action are available in all courts and Citizens' Advice Bureaux. These require only the answering of some simple questions and to commence his action all the litigant needs to do is to complete that form and a form of request for a summons which will be given to him by the court clerk. Although there are four forms of request for summons, the court clerk will choose the correct one. It is unlikely that further paper work will be necessary.

'The proceedings are totally informal, they are in private in the registrar's room. There are no complicated rules of procedure or evidence and the registrar decides the way in which the arbitration should be conducted. The award is usually given at the end of the arbitration, with reasons.

'The fee to begin an action varies from £1 when the claim is for up to £10, to £12 when the claim is for over £500. The successful party recovers his court fee and his expenses in travelling to court together with the fees of any witness.

'The time taken for the whole process is an average seven to eight weeks. This is shorter than the period taken for proceedings to trial which are not in the small claims category because all procedure is cut to the minimum.'

Although this procedure was now open to the consumer, Mr. Maclennan stressed that no one should go to court before the possibilities of conciliation had been fully explored.

'Citizens' Advice Bureaux, Consumers' Advice Centres and other sources of advice can help to promote a compromise or an agreement satisfactory to the parties which avoid going to court. They can also provide basic advice about the law, especially that of contract, before proceedings begin. Where the consumer feels he may have cause to use the procedure, he should not hesitate to ask the advice of one of these centres. Although advisers should be well qualified to provide advice the Lord Chancellor's Office will always be prepared to mount a days' course for them with the local registrar.

'Since the scheme was introduced in 1973 the consumer has increasingly grown to realise that, by using this procedure, going to court need not be a daunting prospect. In fact, over 8,000 cases were arbitrated in 1975, an increase of 60 per cent over 1974. A similar increase appears likely for 1976.

Small Firms Information Centres

Centre	Telephone	Freefone area	Freefone	Telex
Birmingham	021-643 3344	West Midlands	4054	337919
Bristol	294546	South West	9910	449650
Cardiff	396116	Wales	1208	497515
Glasgow	041-248 6014	Scotland	846	779334
Leeds	445151	Yorks/Humberside	5361	557687
London	01-828 2384	London & South East	2079	917920
Luton	29215	Eastern	372	826115
Manchester	061-832 5282	North Western	6005	667952
Newcastle	25353	Northern	529	537429
Nottingham	49791	East Midlands	4062	377313

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ENCIRCLE TI 105 ON PAGE 59 FOR FURTHER INFORMATION

Airports strategy for Great Britain

The publication of the consultation document, 'Airport Strategy for Great Britain, Part 2: Regional Airports', was reported in last week's *Trade and Industry*, page 766. The principal chapters of the document are summarised below:

Air traffic forecasts (Chapter 4)

The document forecasts that the total level of air passenger demand at airports in Great Britain, outside the London area, by 1990 could be between 23 and 32 million a year. It provides no range in demand for individual airports although it does forecast that by 1990, as the result of natural growth, all the regional airports combined might be handling about 27.5 million passengers a year.

Table 1 summarises the traffic position at Britain's regional airports in 1974, and estimates what natural growth might produce by 1990.

TABLE 1 — Thousands of passengers

Airport	1974	Natural growth forecast 1990
Manchester	2,322	6,500
Glasgow	1,935	3,900
Birmingham	1,017	3,000
Edinburgh	791	1,600
Newcastle	581	1,500
Liverpool	499	1,000
Aberdeen	446	1,200
East Midlands	442	1,500
Prestwick	343	1,600
Leeds/Bradford	283	500
Glamorgan	230	1,000
Tees-side	187	750
Bristol	184	1,000
Bournemouth	129	500
Southampton	309	2,000
Blackpool	133	
Norwich	94	
Exeter	75	
Humberside	4	
Carlisle	2	
Coventry	2	
Others	691	
	10,699	27,550

While the forecasts cover the period up to 1990, it is thought unlikely that the provision of regional airport capacity will present any major problems up to the year 2000.

Towards a strategy (Chapter 5)

The document records that, during the Government's preliminary consultations following the cancellation of the Maplin Airport project, there was widespread recognition of the need to set future airport development in a national context. This document represents the most comprehensive examination which has been undertaken of the scope for a national airports policy.

In the future, the document says, there could be more competition for traffic between regional airports. This is likely to result from an increase in the demand for air travel, greater pressure on the London airports, and the ability of the larger regional airports to sustain a wider range of services with acceptable frequencies to international destinations.

The result, says the document, is likely to be a concentration of scheduled services at a small number of regional airports. Such a development would help the passenger and also help take some of the pressure off the London area.

The over-provision of facilities at a number of regional airports, which has contributed to heavy financial losses, must be avoided in the future.

This might be achieved by the more systematic approach to the development of airports discussed in the document, and also by a different approach to charging policies at the airports.

Emerging from the document is a system of placing airports into three distinct categories.

The categories would be:

Category A – airports which would support an increasing range and frequency of international scheduled services, possibly including intercontinental services, and also a significant element of freight traffic in addition to domestic and charter services;

Category B – airports which would cater primarily for domestic and charter services, and possibly a limited network of short-haul scheduled international services; and

Category C – airports which would have a mainly local role, perhaps concentrating on general aviation with some domestic services and charter flights.

The document says it is likely that only three or four regional airports would fall into category A. It would be difficult to identify those having the best potential, and considerations like the noise and environmental aspects, the views of the consumer, and also political implications, would have to be taken into account, together with aviation and economic factors.

During the Government's preliminary consultations, other matters were raised as having a bearing on the development of an airports strategy. These included the role of airports in promoting employment and industrial development; the suggestion that the existence of an airport stimulated a demand for services; the notion that each economic planning region should have its own major airport; and the alleged shortage of airport facilities in certain areas.

The document concludes: 'It seems doubtful whether any of these factors justify the major importance which is sometimes attributed to them'.

Future ownership and financing (Chapter 12)

In the absence of a national airports strategy, says the document, some local authorities have been uncertain about the likelihood of getting Government assistance for particular airport developments.

But the development of a firm strategy could provide a more coherent framework for the application of the existing criteria for Government financial aid to future airport plans (in the 1961 White Paper, 'Civil Aerodromes and Air Navigational Services', Cmnd. 1457).

The document says that the creation of the BAA recognised the advantages of common ownership for the nation's main airports. It would therefore be consistent with this approach to conclude that a strategy which sought to identify regional airports ripe for significant increases in traffic would also involve the common ownership of the airports concerned.

'In practice,' says the document, 'this would seem to suggest ownership by the BAA'.

The advantages of such a move are identified as the creating of a unified system and the making available to the selected airports of not only the managerial and other resources of the BAA but also the benefits of co-ordinated planning, charging and investment policies.

But it is stressed that this is an issue presented as a basis for consultation.

Noise (Chapter 10)

With the exception of Heathrow, the document says, more people are affected by aircraft noise at either Glasgow or Manchester than at any other airports in Great Britain. It adds that by 1990 there should be an improvement in aircraft noise, particularly at those airports most affected now, like Manchester, Glasgow and Birmingham.

But the reduction in noise levels is likely to be less marked than at the London area airports due to the later introduction of quieter and larger aircraft on most of the services using regional airports. By 1990 more people are likely to be disturbed by aircraft noise at those regional airports which handle a significant amount of traffic that at either Luton, Stansted or even Gatwick. Therefore, says the document, the noise issue is not of itself justification for the diversion of traffic from the London area to the regions.

Scope for diversion (Chapter 7)

There should be some scope for increasing traffic at regional airports by encouraging their use by passengers with local origins or destinations who now use airports in the London area. The main encouragement to this development would be the wider range of frequencies which some airports should be able to offer in the future.

But diverting passengers with origins and destinations in the south east raises problems. Even if it were feasible, such diversions would be confined mainly to airports near the region and also to leisure traffic. However most overseas visitors prefer to use London as a base.

The document says it is clear that a significant level of diversion could only be achieved if severe restrictions involving considerable additional costs were imposed on passengers and airlines using the London area airports.

For example, it is estimated that a surcharge of £4.50 (at 1975 prices) on every London area passenger would be necessary to divert 12 per cent of international traffic to regional airports. Nevertheless, encouragement of increasing use of airports outside the London area should remain an important objective.

Development at specific airports

The document records that the advice of the CAA, which has published a series of reports on the future development of the main regional airports in England and Wales, has been taken fully into account. But it stresses that no decisions on the role of particular airports will be made in advance of the promised consultations.

It also points out that while a strategy of concentrating traffic at certain airports must affect traffic at neighbouring ones, it does not necessarily mean that these airports should close. They could well have a continuing role in catering for local needs, and any decision on their future must be for their owners to take.

England and Wales (Chapter 8)

Manchester. Manchester Airport already handles twice as many passengers as any other British airport outside the London area and Scotland. It is expected to maintain this position up to 1990, handling 6.5 million (natural growth forecast) passengers annually – well within the present terminal capacity of 7.5 to 8 million passengers. Such a level would enable Manchester to become a major international airport, serving much of the north west, Yorkshire, the north Midlands, and North Wales.

With the concentration of traffic from these areas, the diversion of some traffic from London, and the implementation of restrictive policies affecting passengers, it is possible that up to 12 million passengers a year might be handled at the airport. This would have a number of consequencies and would obviously cause a reduction in traffic at airports in the wider catchment area which Manchester could be expected to serve.

Liverpool. Under conditions of natural growth, traffic at Liverpool airport could reach 1 million passengers a year by 1990. But diversion of traffic from Manchester, which could lead to under-utilisation of facilities there, and a need for new terminal facilities at Liverpool, could increase the traffic level to 4 million.

Birmingham and East Midlands. By 1990, Birmingham could become a significant international airport handling about 3 million passengers a year, but it would still be primarily concerned with short and medium haul routes. To accommodate this growth, new terminal facilities – close to the National Exhibition Centre and the new railway station – would be needed.

East Midlands might achieve an annual passenger throughput of 1.4 million, for which the present terminal facilities would be adequate.

With the adoption of restrictive policies, one or other of these two airports might be peveloped to cater for 10 million passengers a year. Some of this could result from the concentration of services but most would have to be from traffic diverted from London.

The document makes the point that if one of the two airports were selected to become a major one, the other would have to play a minor role. In any case, traffic would be taken from other airports, and runway extensions would have to be made.

The document concludes that, of the two options, expansion at East Midlands would probably be the most difficult to achieve, but accepts that it, like Birmingham, is well placed in relation to the existing and future motorway network.

Leeds/Bradford. With a natural growth, Leeds/Bradford airport might handle ½ million passengers annually. If the runway were extended to take short-and-medium-haul jet aircraft, this figure could treble. Even so, apart from the runway extension it is unlikely that much further investment would be needed.

Newcastle and Teesside. By 1990 Newcastle and Teesside airports could have annual traffic levels of 1.5 million and 0.75 million, respectively – and no significant new terminal or runway facilities would be needed at either airport. The document suggests that concentration of traffic at one airport might result in a wider range of services for the area as a whole. This could be expensive in terms of development costs and costs to passengers, but in view of the limited catchment area, in neither case is it likely that the airports would develop into major airports of the kind which might be envisaged at Manchester and in the Midlands.

Glamorgan and Bristol. Given natural growth, both Glamorgan and Bristol airports might handle 1 million passengers a year by 1990. The present terminal at Glamorgan could cope with 1.5 million but Bristol would need a new terminal long before 1990.

The Government discusses two options for development of airport facilities in South Wales and the south west:

Option 1 – concentrate traffic at Glamorgan, which might handle 2 million passengers a year by 1990. Verdict: this would mean low investment in new airport facilities, but Glamorgan seems to be less attractive to diverted traffic.

Option 2 – build up Bristol to handle 4 million passengers a year. Verdict: this would depend heavily on diversion of London traffic and would be costly.

Southampton and Bournemouth. While either Glamorgan or Bristol might be developed further, Southampton and Bournemouth are unlikely to expand into significant regional airports. But both are accessible enough to make diversion from London possible. Under these conditions, the document says it might be possible to expand Bournemouth – where land is available – to take 5 million passengers a year.

The document concludes that no radical changes can be expected in the role of airports like Blackpool, Carlisle, Coventry, Exeter, Humberside and Norwich.

Groundside implications (Chapter 9)

The access and planning implications of possible airport developments are essentially matters for discussion with the local authorities and other bodies who are being consulted. Nevertheless, the document suggests that, partly because of the smaller scale of the regional airports, problems of access and regional planning may not generally loom as large as those that are sometimes raised with some of the London airports. Importantly, all the Northern airports and Glamorgan are in Assisted Areas where expansion would com-

This new computer system, the ICL 2960, designed to bring to the medium user a range of facilities hitherto available only on the largest systems, has been launched by International Computers Ltd. The system bridges a gap between the company's large computers, the 2980 and 2970 series, and the small 2903 system. In the foreground is the master operating station, consisting of an interactive display (right) and monitor display (left). On the left is the four-bay cabinet incorporating the engineers' control processor, order code processor, half-megabyte of main store and the store multiple access control. Behind the master operating station is a 1,500-line per minute printer. A large number of satellite terminals can be linked to the central processor so that the branches of a company can make full use of the computer sited at head office. Pre-launch marketing of the new system has already resulted in a number of orders, including one of £1.4 million from a British supermarket chain : total orders have reached a value of £150 million.

plement Government regional industrial development policies.

Scottish airports (Chapter 11)

Policy decisions on airports in England and Wales are unlikely to affect airports in Scotland, says the document. Nor is the forecast growth in traffic at Scottish airports thought likely to present any particular problems of access, planning or related problems, and any increase in employment would be beneficial.

Passenger traffic at Aberdeen, Edinburgh, Glasgow and Prestwick – all owned by the British Airports Authority – could be expected to increase to a combined total of 8 million a year. Each airport has its own particular function, and this is likely to be maintained in the future, although Edinburgh might take more international traffic than it does now. The rapid growth in traffic at Aberdeen – due to the development of the North Sea oil industry – is expected to continue. With the planned developments at Glasgow and Edinburgh and the present facilities at Prestwick, adequate capacity will be available at the three Lowland airports to meet the demands of the foreseeable future. As a result, the document concludes, there would be no need for a new airport in central Scotland.

Extensive redevelopment work, financed by Government grants, has been undertaken at Sumburgh and Inverness, two of the eight Highlands and Islands airports operated by the Civil Aviation Authority, as a result of the development of North Sea oil. Further investment at the Highlands and Islands aerodromes is likely to be needed between now and 1980, says the document, which also records that the Government is now considering the future ownership of these airports with the BAA and CAA.

Notes

Copies of the document are available from HMSO, price £6 net each.

The issue of this document follows publication of a similar study of London area airports last November. This in turn followed preliminary consultations initiated shortly after the abandonment of the Maplin airport project, which was announced in 1974. Consultations on the London document are proceeding.

The consultations on this document will be conducted by the Department of Trade, the Department of the Environment and the Scottish and Welsh Offices. The Government intends that all those concerned should have an adequate opportunity to express their views on all aspects relevant to the development of airports. It is proposed to allow six months for the consultations and the Government will take into account the views expressed in the consultations in both this document and Part 1 before putting proposals to Parliament on future airports policy.

Renegotiation of Bermuda Air Services Agreement

The United Kingdom Government has asked the United States Government for consultations for a renegotiation of their Air Services Agreement, known as the Bermuda Agreement.

This was announced by Edmund Dell, Secretary of State for Trade, in a written answer in the House of Commons on 23 June in reply to a question by Ian Wrigglesworth (Teesside, Thornaby).

Mr. Wrigglesworth asked if the Secretary of State was satisfied that the Bermuda Agreement between the United Kingdom and the United States of America was still an effective instrument for regulating scheduled air services.

Mr. Dell replied:

'The Bermuda Agreement, which was negotiated in 1946 and was the first major Air Services agreement to be negotiated after the Second World War has, over the years, become out-of-date in a number of respects and in our view no longer corresponds satisfactorily to the conditions of the 1970's. It has been evident for some time that the benefits the Agreement confers on the United States are much in excess of those gained by us. During recent years, there has been a closer approximation to a balance of earnings from the rights to operate services across the North Atlantic: but it is clear that a substantial revision of the rights conferred by the agreement is needed in order to achieve a more equitable balance of benefits overall.

'In addition the agreement needs a number of improvements to make it function more efficiently. Its wording is less precise than that of more recent agreements. A more up-to-date text is needed to prevent the difficulties that have increasingly been encountered in its interpretation and implementation. Particular examples are the provisions relating to capacity and to fares.

'Consequently HMG believe that the time has come to renegotiate the Bermuda Agreement as a whole. Accordingly, we have requested consultations for a renegotiation and, pending the outcome of these consultations, we have served notice of termination of the existing agreement. Such notice will run for 12 months from 22 June 1976. In the meantime, we shall work constructively with the United States authorities in order to secure the establishment of a more equitable and rational agreement.'

Notes

The Air Services Agreement between the UK and the USA, generally known as the Bermuda Agreement, was negotiated at Bermuda on 11 February 1946. It deals only with scheduled air services but covers such services between points in the UK (and in UK territories such as Hong Kong and Bermuda for which the UK retains international civil aviation responsibility) and points in the USA and its territories. This agreement does not apply to charter air services between the UK and USA.

There is a short term Memorandum of Understanding dealing with UK/US charter air services which terminates on 31 December 1976 (see *Trade and Industry*, 2 April, page 7).

The only previous major renegotiation of the Bermuda Agreement was in 1966 when the Route Schedules for both UK and US airlines which form a part of the Agreement were completely revised.

Consultations towards a renegotiation can be requested under Article 13 of the Bermuda Agreement by either party. Pending the outcome of such consultations, it is open to either party to give notice of termination of the present agreement; this takes effect 12 calendar months after such notice is received by the other party. This means that the present agreement will cease to be effective on 23 June 1977.

Prevention of oil pollution around UK

Fines totalling £81,380 were imposed in 56 cases of prosecution for unlawful discharge of oil around the UK during 1975. Twenty-six convictions related to offences by UK registered ships, 26 by foreign registered ships and the other four related to discharges from land installations.

These figures are contained in the Annual Report on the exercise and performance of the functions of the Department of Trade under the Prevention of Oil Pollution Act 1971 laid before Parliament on 24 June.

During the year Department of Trade surveyors carried out 1,731 inspections of vessels under the Act. Fifty-five prosecutions were undertaken by harbour authorities for offences committed in ports, of which 53 resulted in convictions. The other three prosecutions, all successful, were undertaken by the Department of Trade for offences at sea. From the fines five awards totalling £1,504.79 were made towards the cost of removing oil pollution.

Copies of 'Report on the Exercise and Performance of the Functions of the Department of Trade under the Prevention of Oil Pollution Act 1971 during the year ended 31 December 1975' are obtainable from the Marine Library, Sunley House, High Holborn, London WC1V 6LP.

Of four occasions during 1975 the Department of Trade organised oil clearance operations at sea around the coast of the UK. These were off the south-west coast of Wales, two in Torbay and the other in the Dover Strait. The most serious was the spillage of

2,500 tonnes of crude oil from the tanker *Olympic Alliance* following the collision with HMS *Achilles* in the Dover Strait. The department also assisted the Dutch authorities by sending two spraying vessels to the operation mounted to deal with oil spilled from the tanker *Pacific Colocotronis* off the Dutch coast.

The registration of submersibles

All submersibles operating within UK territorial waters or operating from a British ship will have to be separately registered from 17 July 1976.

British owned submersibles are already registered under the Merchant Shipping Acts as 'ships' and will continue to be so registered, but a statutory instrument published on 23 June (Merchant Shipping (Registration of Submersible craft) Regulations 1976. SI 1976/940. HMSO) requires that they will also have to be registered as 'submersibles'.

Owners of submersible craft must apply to the Department of Trade for registration of their craft within 90 days of 17 July 1976.

Registration in no way implies that the craft meet any particular standard. At present there is a high standard of safety in the operation of submersibles. In order to ensure that this is maintained, the department is consulting the industry on the preparation of future safety legislation.

Further diving safeguards announced

All commercial diving operations taking place in UK territorial areas, and all diving in connection with offshore petroleum operations in designated areas on the United Kingdom Continental Shelf, are now the subject of statutory safety provisions, Dr. Dickson Mabon said on 18 June.

Dr. Mabon, Minister of State for Energy was answering a parliamentary question from Mr. Ian Campbell (West Dunbartonshire) who asked when regulations would be introduced under the Petroleum and Submarine Pipelines Act 1975, for the safety of diving operations connected with the laying of submarine pipelines about the UK.

Replying, Dr. Mabon said: 'The Submarine Pipelines (Diving Operations) Regulations 1976 made on the 14 June are laid before the House today. With the introduction of these regulations all commercial diving operations taking place in UK territorial seas, and all diving in connection with offshore petroleum operations in designated areas of the UK Continental Shelf, are now the subject of statutory safety provisions. The new regulations, which relate to the diving operations carried out in respect of submarine pipelines and associated works, closely follow the Offshore Installations (Diving Operations) Regulations 1974 and the Merchant Shipping (Diving Operations) Regulations 1975.'

Patents endorsed 'Licences of Right'

Under Section 35 of the Patents Act 1949 the following patents were endorsed 'Licences of Right' on the dates specified.

28 May 1976

1,284,284	Automobiles Peugeot and Regie Nationale des Usines Renault	Combined energy-absorber and electrical switch for a safety system in a vehicle
1,298,775	Automobiles Peugeot and Regie Nationale des Usines Renault	Improvements in or relating to a device for interlocking two relatively slidable elements
1,333,789	Automobiles Peugeot and Regie Nationale des Usines Renault	Improvements in or relating to a support device for a seat, in particular for a vehicle
1,352,166	Automobiles Peugeot and Regie Nationale des Usines Renault	Improvements in or relating to a gas removing device for a flowing liquid
1,366,362	Automobiles Peugeot and Regie Nationale des Usines Renault	Improvements in or relating to a device for interlocking two elements which are relatively slidable
1,369,003	Automobiles Peugeot and Regie Nationale des Usines Renault	Improvements in or relating to a switch and its applications in particular in a safety device for an electric window-raiser
1,373,357	Automobiles Peugeot and Regie Nationale des Usines Renault	Improvements in or relating to a gas-removal apparatus
1,373,846	Automobiles Peugeot and Regie Nationale des Usines Renault	Improvements in or relating to vehicle roofs
1,386,005	Automobiles Peugeot and Regie Nationale des Usines Renault	Improvements in or relating to a drive for an ignition distributor for an internal combustion engine
1,391,474	Automobiles Peugeot and Regie Nationale des Usines Renault	Improvements in or relating to a mechanism for adjusting the position of the backrest of a vehicle seat
1,395,396	Automobiles Peugeot and Regie Nationale des Usines Renault	Improvements in or relating to a filter cartridge and filter including said cartridge
1,070,482	Societe Anonyme Automobiles Citreon	Improvements in or relating to devices for selectively controlling the braking of vehicle axles
1,109,222	Societe Anonyme Automobiles Citreon	Improvements in or relating to devices for automatically adjusting the inclination of the headlamps of an automotive vehicle
1,187,665	Ibis Engineers Ltd.	Improvements in pressing machines for use in the laundry, dry cleaning and clothing industries
1,238,592	Ibis Engineers Ltd.	Improvements in apparatus for bonding textile material
1,380,716	Jumpei Ohnaka	Improvements in apparatus for propulsion through fluid and/or extracting energy from a flowing fluid
1,380,717	Jumpei Ohnaka	Improvements in swimming aids
1,402,092	Arthur Shaw Manufacturing Ltd.	Improvements in or relating to window frames comprising mountings for window furniture
1,410,522	Ludwig Baumann	Appliance for bubbling compressed air through a liquid particularly water in a bathing tub

7 June 1976

1,164,980	United States Energy Research and Development Administration	Process for depleting 238 PuO_2 in 17, and 18,
1,180,529	United States Energy Research and Development Administration	Ferroelectric ceramic optical retardation devices
1,192,497	United States Energy Research and Development Administration	Electrochemical cell
1,204,300	United States Energy Research and Development Administration	Radioisotope heat source
1,253,639	United States Energy Research and Development Administration	Reactor power level sensing device
1,289,940	United States Energy Research and Development Administration	Radioisotopic fuel capsule and method of making same
1,304,480	United States Energy Research and Development Administration	Radiation monitor with background compensation
1,306,896	United States Energy Research and Development Administration	Removal of plutonium from plutonium hexaflouroide-uranium hexaflouride mixtures
1,313,439	United States Energy Research and Development Administration	Cation exchange conversion of hydroxy lamine sulfate to hydroxylamine nitrate
1,314,468	United States Energy Research and Development Administration	Bone substitute
1,354,558	United States Energy Research and Development Association	Non-equilibrium plasma reactor for converting methane to ethane and ethylene
1,358,066	United States Energy Research and Development Administration	Laminar gas flow radiation detector
1,360,806	United States Energy Research and Development Administration	Laminar flow cell
1,371,448	United States Energy Research and Development Administration	Recovery of purified helium of hydrogen from gas mixtures
1,388,497	United States Energy Research and Development Administration	Process for the separation of components from gas mixtures
1,390,045	United States Energy Research and Development Administration	A transmission line
1,236,172	Automobiles Peugeot and Regie Nationale des Usines Renault	Improvements in or relating to a device for absoring energy and applications thereof
1,240,916	Automobiles Peugeot and Regie Nationale des Usines Renault	Improvements in or relating to a device for cleaning a windscreen
1,242,376	Automobiles Peugeot and Regie Nationale des Usines Renault	Improvements in or relating to an electrode for an electrophoresis painting installation
967,672	Price Brothers and Co. Ltd.	Improvements in or relating to pillows
1,155,079	Daimler-Benz Aktiengesellschaft	Drive for auxiliary equipment for internal combustion engines, particularly in motor vehicles
1,207,463	Nippon Victor Kabushiki Kaisha	A combination player for discs and tape-cartridges
1,222,539	Ernst Leitz GmbH	A polarising microscope equipped with a tube lens system
1,227,535	FEB (Great Britain) Ltd.	Improvements in or relating to fixing devices
1,266,419	John Derek Bolton	Combined boat trailer and launching trolley
1,314,912	John Vernon Buckland	Improvements relating to the prevention of oil pollution from ships, docks, oil refineries and similar objects

Any person who claims that the patentee at the time of endorsement of any of the above patents was precluded by a contract in which claimant is interested from granting licences under the patents may apply for cancellation of the endorsement on Patents Form No. 45 within two months after the date of endorsement.

E. Armitage
Comptroller

Technology News

Coal research benefits from collaboration

Progress on five International Energy Agency coal research projects, based in Britain, will show how countries can collaborate to pioneer new techniques quickly, effectively and cheaply.

Leslie Grainger, who leads the IEA's coal technology group responsible for these projects, said in Washington this week: 'By pooling resources in this way coal can be regarded as an international industry with different countries sharing the benefits of research.

'Coal is the fossil fuel with the greatest extent of reserves throughout the world. New frontiers of technology need to be opened up so that this prolific energy resource can be effectively used for many future generations as an efficient fuel, as a substitute for petrochemicals and as a provider of abundant gas supplies.'

Fluidised combustion is the biggest of the five IEA coal projects and is jointly financed by Britain, USA, and Germany with an investment of about £10 million. This new style combustion plant will be built at Grimethorpe, Yorkshire, to investigate the special features of a new method of burning coal using a bed of red hot ash transformed into a fluid state by means of injected air.

This improved method of burning coal has a wide ranging potential – from small commercial boilers to major plant for electricity generating stations. The contract has been allocated for the design of the pressurised fluidised combustion rig with a coal input of 10 tons an hour and a thermal capacity of 85 megawatts. The data from this biggest plant of its kind will back up commercial developments now taking place in the USA and Europe.

Specifications are being prepared for tender documents for the major items of equipment and the contract for the entire project is expected to be placed next year.

For providing steam-raising plant, the fluidised bed process has many advantages. These include compactness – being smaller than conventional boiler plant it consequently has a lower capital cost; high thermal efficiency – even when burning low quality coal; and the prevention of environmental pollution – by retaining sulphur in the ash bed instead of sending it into the atmosphere.

Four other IEA coal projects cover research services. A company called NCB (IEA Services) Ltd. has been set up in Britain to manage the projects for each international executive committee.

'All the major decisions are referred to the appropriate international executive committee for each project – a good example of international co-operation that works', said Mr. Grainger. 'We are relying heavily on facilities in the USA, particularly the data bank services of the American Geological Survey.'

The IEA projects add to long-established links between the coal industries of the UK and the USA, including exchange agreements involving the US Energy Research and Development Organisation and the Department of the Interior.

'Reliability assessment – theory and practice'

The introductory courses on Reliability Assessment, which have been run for industry by the United Kingdom Atomic Energy Authority's Systems Reliability Service and Liverpool University since 1971, continue to be very popular. Demand for places on the course scheduled for 13-24 September 1976 was so great that it was quickly oversubscribed and arrangements have now been made to run an additional course from 20 September-1 October.

The courses cover techniques applied to both nuclear and non-nuclear industries and are aimed at engineers, technologists, designers, operators, managers and support staff concerned with achieving reliability in complex equipment and systems. Subjects included are the mathematics of probability and its application to testing and maintenance of equipment and the prediction of failure rates; systems synthesis and modelling; computer analysis and data bank services.

The courses are held at Liverpool University; the lecturers are drawn from SRS and the Universities of Liverpool, Birmingham, Bradford and Manchester. Previous courses have been attended by staff from a wide range of industries (including aerospace, chemical, computer, defence, electricity production and distribution, fire protection, gas, glass, nuclear power, oil, shipping and steel), consultants and academics – many of them from Europe. The fee is £200 (£170 for associate members of SRS) exclusive of VAT and accommodation.

Applications to attend the additional course, and inquiries about future courses, should be sent to: Miss Mary Sutton, Systems Reliability Service, UK Atomic Energy Authority, Wigshaw Lane, Culcheth, Warrington, WA3 4NE. tel. Warrington (0925) 31244, ext. 318.

Circuits and systems – call for papers

A conference on computer-aided design of electronic and microwave circuits and systems is to be held at the University of Hull, from 12-14 July 1977. It is sponsored by the Institute of Electrical and Electronics Engineers and the University of Hull.

It is felt that there are many common computational techniques in circuit design and microwave applications. The conference will not just be a gathering of academics; good industrial participation will, hopefully, be achieved. Subjects of immediate engineering relevance such as lay-out problems, practical circuit and system design, tolerance problems, microwave circuits, microwave integrated circuits, antenna design; together with numerical methods, design automation and optimisation techniques are within its scope. Papers in these areas are solicited.

The deadline for submission of papers is 15 December 1976 and authors should send three copies to the Conference Secretariat, Department of Electronic Engineering, The University, Hull HU6 7RX.

Safety testing of dusts and gases

For some months now the Bureau of Industrial Liaison at Surrey University have been offering an environmental and safety testing service for dusts and gaseous substances, encountered in industry, which are likely to be a health hazard to employees. For example, materials can be examined that contain – or are suspected of containing – asbestos; air samples can be analysed for certain vapours for which safety limits exist; biological solids and liquids can be analysed and micro-organisms identified. Inquiries should be directed to Dr A. Harrison, Wolfson Bioanalytical Centre, or J. Hollinghurst, Bureau of Industrial Liaison, tel. Guildford (0453)-71281.

New medical isotope

A medical radioisotope, which has been found by researchers in five British hospitals to provide major advances in the diagnosis of liver and kidney disease, was on show to the public in the UK for the first time at a major medical exhibition last month.

The event, the Hospital Equipment and Health Services Exhibition was at the National Exhibition Centre, Birmingham, from 14-17 June.

The isotope, Iodine 123, is the result of 18 months' research in the Variable Energy Cyclotron at the Harwell, Oxfordshire, Laboratory of the United Kingdom Atomic Energy Authority.

Iodine 123 has been found by researchers in three London hospitals, one in Manchester and one in Liverpool, to have the capacity of giving the patient a lower dose of radiation while providing a diagnosis of quality comparable with other isotopes. Details of the results of this research were on show at the exhibition.

The Harwell team believes this work represents a significant breakthrough. They say the isotope, which they are able to produce on a widespread scale, also has special advantages in kidney transplant surgery. Because of the isotope's shorter half life and radiation characteristics, doses to the patient are lower than for some other isotopes; this means it may also be of special help in diagnosing diseases of children.

Now the Harwell scientists have reached the stage where product quality can be assured, they are seeking to assess the interest of the medical world, in Britain and abroad, in the commercial development of Iodine 123.

Technical inquiries to: J. G. Cuninghame, Chemistry Division, Harwell. Tel. Abingdon (0235) 24141, ext. 2840/4093.

Monitoring tunnel boring for the Kielder water scheme

The Transport and Road Research Laboratory will monitor tunnel boring machine performance and the associated rock properties in the first 1.5km of the North Wear Tunnel Drive for the Kielder Water Scheme.

The work will assist the Northumbrian Water Authority and the consulting engineers, Babtie Shaw and Morton, and will also form part of the programme of research into tunnelling techniques by the Tunnels Division of TRRL.

The location was chosen because this section of the tunnel passes through the main three rock types, sandstone, limestone and mudstone, each of roughly equal length.

In addition to the automatically monitored measurements of penetration rate, power and thrust, studies of the disc action in the different rock types will be made from stereophotographs of the tunnel face and from analysis of the debris.

Measurement of the rock properties will include discontinuity scanline surveys and Schmidt hammer tests, also quartz percentage and rock cuttability tests. A knowledge of these properties will enable the influence of rock discontinuities, strength and cuttability on the machine penetration rate and specific energy to be studied.

Supplementary work will include seismic scans along the tunnel, a study of rock classification methods and a comparison of tunnel boring machine performance with that predicted by computer excavation models.

New die ripping machine

A new practical application of a Harwell invention was on show in Switzerland last week. Engis Ltd. of Maidstone, Kent, demonstrated their new ultrasonic die-ripping machine the 'Disonic', at the International Wire Exhibiton at Basle.

The new machine is designed to simplify the maintenance of the tungsten carbide dies used in wire-drawing machinery.

Among the special features is a novel combination of ultrasonic vibration and rotational movement of a diamond plated ripping nib, with contra-rotating movement of a rising work table that carries the die. Cooling oil, fed at a carefully controlled rate, between the nib and the die makes positive use of cavitation to assist in the ripping action and the removal of debris.

These features together with the exceptionally smooth air-supported feed movement of the work table have been developed from an invention made and patented at Harwell for use in its own laboratories, and later licensed by the UK AEA for commercial application.

The machine can be used by a non-craft operator to produce a new reduction angle in a die in a fraction of the time taken using conventional methods.

Teaching how to survey from space

Examination of photographs of the earth taken from space can provide much information about its natural resources.

To assist developing countries in learning more about their natural resources, the Department of Industry is to host a joint United Nations/Food and Agricultural Organisation training seminar.

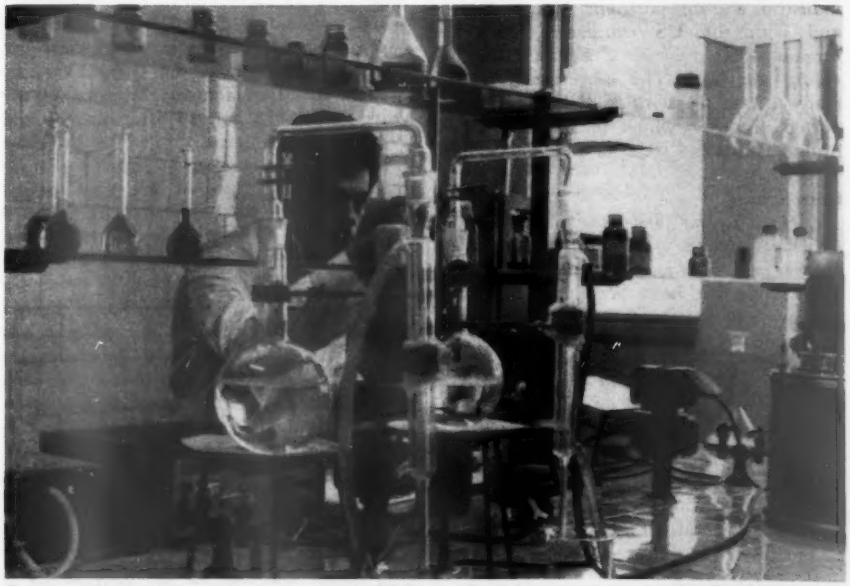
'The Applications of Remote Sensing for Natural Resources Survey, Planning and Development' will be held at the University of Reading from 22 July to 10 August 1976. It will be opened by Sir Ieuan Maddock, Chief Scientist of the Department of Industry.

The aim is to instruct representatives from developing countries in remote sensing – a field of activity in which satellites, sounding rockets and aircraft are used to gather data on the earth's resources. Participants will be taught the basic techniques of photo-interpretation and practical field training.

The seminar programme will cover characteristics of sensors and processing techniques, methodology and techniques of interpretation, applications of remote sensing to specific disciplines and remote sensing in practice.

The majority of the instructors will be from Reading University and other UK institutions. Developments of UK companies concerned with both the hardware and software of remote sensing will be illustrated. During the final week a number of specialists from USA and Europe will speak on actual and potential applications of remote sensing.

The Ministry of Overseas Development, British Overseas Trade Board, Department of the Environment and UK industry are also contributing towards the seminar.



A new medical research centre set up by the Wellcome Foundation at Pomezia, near Rome. Studies to be carried out at the centre will include establishing the safety and efficiency of drugs. They will also carry out specific experiments and some fundamental research, under direction from the company's laboratories near London. About a third of the cost of the centre has been contributed by the Casa Mezzogiorno, a government agency set up for the creation of employment and development in southern Italy.

Parliament

Monday, 21 June

R and D in the computer industry

Mr. Edwin Wainwright (Dearne Valley) asked: 'What has been the amount of money spent on research and development in the computer industry over each of the past six years; and what was the amount contributed by the Government during each year?'

Mr. Williams answered that the latest estimate available of total expenditure is from the 1972 survey of industrial expenditure on research and development when industry reported expenditure of £27 million. He gave details of the government contribution over the past six financial years as follows: 1970/71 £3.88 million, 1971/72 £2.70 million, 1972/73 £10.95 million, 1973/74 £10.90 million, 1974/75 £11.08 million and 1975/76 £9.27 million.

European aerospace industry

Mr. Peter Rost (South East Derbyshire) asked for a progress report on the Secretary of State for Industry's talks with the French aerospace industry on collaborative projects, and Mr. Norman Tebbit (Waltham Forest, Chingford) referred to delays in the progress of the Bill to nationalise the aerospace construction industry, and asked for a statement on the Government's intentions towards the support of the collaborative projects currently advocated by UK companies and by the EEC commission and other European and United States manufacturers.

Mr. Kaufman stated: 'I met General Mitterand, chairman of Aerospatiale, on 1 June, and M. Cavaille, Secretary of State for Transport, on 2 June for talks in Paris following visits to Dassault-Breguet, Aerospatiale and Airbus Industrie in Toulouse. Discussions on possible future projects and collaborative arrangements are progressing on the industrial and official fronts, both in Europe and with the US companies, with the Organising Committee of British Aerospace taking the lead. The Government stands ready to take decisions on any properly supported proposals which the industry might bring forward as a result of these discussions.'

Concorde

Mr. Hugh Jenkins (Wandsworth, Putney) asked for the latest estimate of sales of Concorde; and how far these meet earlier estimates of such sales.

'Five aircraft have been sold to British Airways and four to Air France,' said Mr. Kaufman. 'Negotiations are continuing for the sale of two Concordes to Iranair, and discussions about a lease of two aircraft are taking place with Japan Air Lines. A number of other airlines are interested in buying or leasing Concorde, and the manufacturers are in touch with them. There has been no substantial change in sales estimates since the present 16 aircraft programme was authorised in July 1974.'

Civil aviation projects

Mr. Paul B. Rose (Manchester, Blackley) asked what new aviation projects are to be commenced during 1976.

Mr. Huckfield answered: 'The UK industry is currently engaged in a detailed examination of all the options for future civil aircraft projects. They have not, as yet, come forward with any specific proposals. Among the options are collaboration on derivatives of the Airbus, the HS146 and a European 150-seat aircraft, one possibility for which is a derivative of the BAC 1-11.'

Value of manufacturing production

Mr. Ralph Howell (North Norfolk) asked: 'What was the total value of manufacturing production in 1960, 1973 and 1975 at current prices and at 1975 prices?'

Mr. Huckfield gave estimates of the value of the contribution to the Gross Domestic Product by Manufacturing Industry for the years 1960, 1973 and 1975, at current and 1970 prices, as follows:

£ billion

	Current prices	1970 prices
1960	8.2	10.6
1973	18.7	15.6
1975	24.1	14.3

The information is not available at 1975 prices.

Steel industry

Mr. Peter Hardy (Rother Valley) inquired about total public expenditure incurred during each of the last seven years to promote investment in the steel industry.

'I regret that not all the information is available in the form requested,' said Mr. Huckfield. 'The bulk of investment in the last seven years has been made by the British Steel Corporation, whose capital expenditure has been as follows:'

Year	£ million
Oct. 1968-Sept. 1969	74
Oct. 1969-Mar. 1970 (six months)	39
1970-71	143
1971-72	237
1972-73	198
1973-74	187
1974-75	311

'BSC's Annual Report for 1975-76 is not yet available, but the Corporation estimate they spent over £500 million in that year on capital investment,' said Mr. Huckfield.

'In addition, the steel industry has benefited from Government assistance to industry in general. Such assistance has been given in the past under the Industrial Development Act 1966 and the Local Employment Acts, but no detailed figures are readily available. Assistance is now primarily available under the Industry Act 1972; details may be found in the Annual Reports to Parliament on the operation of the Act. Expenditure on Regional Development Grants under the first part of the Act for the entire metal manufacturing sector (SIC Order IV), including BSC, has been as follows:

Year	£ million
1972-73	0.1
1973-74	19.9
1974-75	31.2
1975-76	64.2

'No separate figures are available on expenditure on Selective Financial Assistance under Section 7 of the Act for the metal manufacturing industry, but offers of assistance under this section have been as follows:

Year	£ million
1973-74	5.9
1974-75	9.6
1975-76	6.5

Ministers at the Department of Industry

Secretary of State for Industry: Eric Varley
Ministers of State: Alan Williams
Gerald Kaufman
Parliamentary Under-Secretaries of State: Lord Melchett
Leslie Huckfield

Ministers at the Department of Trade

Secretary of State for Trade: Edmund Dell
Parliamentary Under-Secretaries of State: Michael Meacher
Stanley Clinton Davis

Ministers at the Department of Prices and Consumer Protection

Secretary of State for Prices and Consumer Protection:
Shirley Williams
Minister of State: John Fraser
Parliamentary Under-Secretary of State: Robert Maclennan

'Finally, £40 million has been provided under Section 8 of the Act for a scheme of selective financial assistance to the ferrous foundry industry. Between the introduction of the scheme on 5 August 1975 and 31 March 1976, £3,868,000 of assistance had been committed towards investment of £19,544,000.'

Planning Agreements

Sir George Young (Ealing, Acton) asked whether any planning agreements have been concluded with public manufacturing companies.

'On 13 April my Rt. Hon. Friend announced that eight companies had agreed to move to operative discussions on Planning Agreements,' replied Mr. Huckfield. 'On 17 May my Rt. Hon. Friend announced that three nationalised industries are also to enter into Planning Agreement discussions. When Planning Agreement has been concluded a statement to that effect will be laid before the House.'

Houghton le Spring

Mr. Tom Urwin (Houghton le Spring) asked what proposals there are to stimulate employment in the constituency of Houghton le Spring and in the Northern region.

Mr. Williams replied: 'Houghton le Spring is in the North East Special Development Area, and manufacturing firms setting up or expanding there qualify for the highest level of regionally preferential assistance; moreover my department accords a high priority in the steering of new projects to the area. There are also grants to attract service industry jobs. The whole of the Northern Region is either a Special Development or a Development Area; the incentives to industry available include Regional Development Grant, the Regional Employment Premium, Selective Financial Assistance and the provision of Government factories. The Region also stands to benefit from the schemes we have introduced to encourage the modernisation and restructuring of specific industries and to bring forward investment in industry generally.'

Hong Kong and People's Republic of China

Mr. T. H. H. Skeet (Bedford) asked: 'What is the balance of trade between Hong Kong and the People's Republic of China?'

Mr. Meacher gave the following information on trade between Hong Kong and the People's Republic of China in 1975 in millions of Hong Kong dollars. On the basis of the *Financial Times* quotation of 4.96 for the rate of exchange between the Hong Kong and the US dollar, the trade deficit was US$1,340 million.

	Hong Kong $ million
Imports (cif)	6,805
Exports (fob)	28
Re-exports (fob)	137
Balance	-6,640

Source: Hong Kong Trade Statistics.

Exports of aluminium

Mr. George Grant (Morpeth) asked for the value of exports of aluminium.

'For unwrought aluminium and alloys, £31.7 million,' said Mr. Meacher.

Trade missions

'In deciding whether to give financial assistance to trade missions to overseas countries, how much account is taken of the results which such missions are likely to achieve in terms of orders for British goods and services?' asked Mr. Ivor Clemitson (Luton East.)

'In making its decisions the British Overseas Trade Board takes into consideration the prospects in the market to be visited for the products and services of each intending participant,' replied Mr. Meacher.

Mr. Clemitson also asked how much financial assistance was given to the Luton, Dunstable and District Chamber of Commerce in respect of their trade mission to South Africa in February and March 1976.

'£5,700,' said Mr. Meacher.

Census of Distribution

Mr. Michael Spicer (South Worcestershire) asked when the Secretary of State for Trade plans to publish all the volumes of the Census of Distribution for which inquiries were completed in 1972.

Mr. Meacher said: 'Twelve of the 13 parts of the printed report have now been published. Part 1 covered the shop and other outlet tables for Great Britain as a whole. Parts 2 to 12 contained tables about Scotland, Wales, the standard regions of England and area summary tables. Part 13, giving tables about retail organisations and the service trades, is expected to be published in October of this year. Summary figures will be released in an article in *Trade and Industry* within the next two months. Much of the delay has been due to the time spent in following up outstanding returns; even now it has been necessary to make estimates for the 22 per cent of retailers enumerated (reckoned to account for 12 per cent of total turnover) who failed to make good returns.'

Company registrations

Mr. Douglas Henderson (East Aberdeenshire) asked for the number of companies currently registered in England and Scotland.

'As at 28 May there were 648,533 companies on the live register maintained by the Registrar for England and Wales,' said Mr. Clinton Davis. 'The comparable figure for Scotland was 31,669.'

Aircraft noise

Mr. Hugh Jenkins (Wandsworth, Putney) asked if the Secretary of State for Trade would take steps to ensure that the noise regulations at Heathrow Airport are observed by Concorde.

'As my Hon. Friend knows Concorde was exempted from the Heathrow noise limits,' replied Mr. Clinton Davis. 'Apart from this the aircraft complies with the noise abatement regulations at Heathrow.'

Airport development in S. Wales and S.W. England

Mr. Dafydd Wigley (Caernarvon) asked what decisions have been taken following the publication of the report by the Civil Aviation Authority on 'Future Airport Development in South Wales and the South West of England' (CAP 380).

Mr. Clinton Davis answered: 'The Civil Aviation Authority's advice on future airport developments in South Wales and the South West of England has been taken into account in the consultation document on regional airports to be published shortly. No decisions concerning the future role of particular airports will be taken in advance of the consultations on that document.'

Laying up oil rigs

Mr. Robert Adley (Christchurch and Lymington) asked if the Secretary of State for Trade would take immediate steps to use such power as he possesses to prohibit the parking of out-of-commission oil-rigs in British territorial waters for which his department is responsible, until all or any such proposals, such as that currently contemplated in the Solent, have been approved or otherwise by the adjacent local authority.

Mr. Clinton Davis said: 'I cannot give such an undertaking because my Rt. Hon. Friend's powers under the Coast Protection Act 1949 relate to navigational hazards rather than environmental questions and consultations is therefore only with navigational interests. On 24 May I refused consent to the laying up of an oil rig in the West Solent on navigational grounds.'

Powers of search and entry

Mr. David Price (Eastleigh) asked for a list of every different circumstance in which officials of the Department of Industry and of all public bodies ultimately answerable to the Secretary of State for Industry, have search and entry powers into either the homes or the business premises of British citizens, with in each case reference to the appropriate statutory authority.

Mr. Huckfield answered: 'Authorised officials of my department may at all reasonable times enter and inspect any premises in which there is or should be any asset in respect of which an Investment Grant or a Regional Development Grant has been made and require the asset to be produced or identified for inspection. The statutory authorities are, respectively, the Industrial Development Act 1966 Section 8(5) and the Industry Act 1972 Schedule 1 paragraph 2.

'In addition to these statutory powers there are a number of agreements and contracts freely entered into by both parties which provide similar rights of entry to business premises.

'Officials of the Post Office may enter buildings for the purposes of constructing or maintaining any telegraphic line. The Post Office is required to endeavour to make an arrangement with the occupier before entering but this requirement does not apply in cases of emergency (Telegraph (Construction) Act 1916 Section 4).

'Telephone and telex subscribers are required to permit persons engaged in the business of the Post Office to enter upon their premises at all reasonable times for the purpose of constructing, inspecting, maintaining, altering or removing telecommunications installations (Post Office Act 1969 Section 28 and the Post Office Telecommunications Scheme 1976, paragraph 15).

'Post Office officials may also, under the authority of a search warrant, enter premises as agents for the Secretary of State for the Home Department. The statutory authorities are the Wireless Telegraphy Act 1949 Section 15 and the Post Office Act 1969 Section 91.'

Mr. Price put the same question to the Secretary of State for Trade.

Mr. Dell answered: 'Officials of my department have search and entry powers as follows:

Authorised officials have power to enter ships for a variety of reasons (including inspection for the purposes of safety and inquiries into death or injuries) and to enter and inspect any premises the entry or inspection of which appears to them to be requisite for the purpose of the reports they have been directed to make	Merchant Act 1894, Sections 420, 431, 459, 463, 465, 471, 488, 729 Merchant Shipping Act 1964, Section 7 Merchant Shipping (Load Lines) Act 1967, Sections 11 and 24 Fishing Vessels (Safety Provision) Act 1970, Section 1 Merchant Shipping Act 1970, Sections 61 and 76, Schedule 2 part 1
The above powers also apply to officials appointed to inquire into contraventions of oil pollution regulations and extend to inspection of premises containing apparatus used for transferring oil	Oil Pollution Act 1971
Where an authorised official has reasonable grounds for believing that there are on any premises provisions or water intended for supply to a ship registered in the United Kingdom, which if provided on the ship, would not be in accordance with regulations under Section 21 of this Act, he may enter the premises and inspect the provisions or water for the purpose of ascertaining whether they would be in accordance with those regulations	Merchant Shipping Act 1970, Section 76
Where a receiver of wreck suspects or receives information that any wreck is secreted or in the possession of some person who is not the owner thereof or that any wreck is otherwise improperly dealt with he may subject to the issue of a warrant from a Justice of Peace enter any house, or other place, wherever situated, and also any vessel, and search for, and seize, and detain any such wreck there found	Merchant Shipping Act 1894, Section 537
In order to enforce the safety provisions relating to hovercraft authorised officials have the right of access to any hoverport and any place where a hovercraft is	Hovercraft Act 1968 and the Hovercraft (General) Order 1972 Article 25 – SI 1972, No. 674
For the purpose of the investigation of aircraft accidents Inspectors of Accidents have powers of access to the place where an accident has occurred and of entry and inspection of any place or building as necessary for the purpose of an investigation	Civil Aviation Act 1949, Section 10 Civil Aviation Act 1968, Section 23 Civil Aviation (Investigation of Accidents) Regulations 1969 – SI 1969, No. 833 Air Navigation (Investigation of Combined Military and Civil Air Accidents) Regulations 1969 – SI 1969, No. 1437
In connection with the safety and airworthiness of civil aircraft, authorised officials have the power to go upon any aerodrome or enter any aircraft factory and aircraft	Civil Aviation Act 1949, Section 8 Air Navigation Order 1974 – SI 1974, No. 1114
As part of the provisions for the protection of aircraft and aerodromes, authorised officials have powers to enter any building or works in an aerodrome	Protection of Aircraft Act 1973, Section 17
Authorised officials have powers to inspect exhibitors' records at the cinema to which they relate	Films Act 1960, Section 30(5)

'Under Section 110 of the Companies Act 1967, a Justice of the Peace may issue a warrant authorising a constable and any other person named in the warrant to enter and search premises on which it is suspected that there are books or papers which have not been produced in accordance with a requirement for production under Section 109. The "other person" in this context may be an official of my department.

'The provisions of Section 110 of the Companies Act 1967 also apply when a requirement for the production of books or papers imposed on an insurance company under Section 36 of the Insurance Companies Act 1974 is not complied with.

'A similar power is provided by Section 19 of the Protection of Depositors Act 1963 in respect of books or papers required to be produced under that Act.

'Officials of the English Tourist Board and the British Tourist Authority have power under the Development of Tourism Act 1969 Schedule 2 to enter and inspect any premises in respect of which a grant has been made under the Act.'

Mr. Price also asked the Secretary of State for Prices and Consumer Protection the same question.

Mrs. Williams said: 'Officials of my department and of public bodies ultimately answerable to me have search and entry powers as follows:

As part of the provisions for enforcement of the legislation on Trade Descriptions and Hallmarking officials of my department are included amongst those who may be authorised for this purpose to enter premises, other than premises used only as a dwelling and to inspect and seize goods and documents. (Prime responsibility for enforcement rests with local authorities)	Trade Descriptions Act 1968, Section 28 Trade Descriptions Act 1972, Section 3 Hallmarking Act 1973, Section 9 Textile Products (Indications of Fibre Content) Regulations 1973 – SI 1973, No. 2124 Crystal Glass (Descriptions) Regulations 1973 – SI 1973, No. 1952
For the purpose of securing compliance with hire purchase and credit sale regulations authorised officers of my department have, subject to the issue of a warrant from a Justice of the Peace, the power to enter business premises and to search for and take possession of any books or papers which appear relevant	Emergency Laws (Re-enactments and Repeals) Act 1964, Section 1 and Schedule 1 Hire Purchase and Credit Sale Agreements (Control) Order 1973 and Control of Hiring Order 1973
For the purpose of enforcing Section 23 and Part XI of the Fair Trading Act 1973, officers of my department are included amongst those who may enter any premises other than those used only as a dwelling, and to inspect and seize goods and documents; and, subject to the issue of a warrant by a Justice of the Peace, to enter any premises for those purposes	Fair Trading Act 1973, Sections 29 and 123
For the purpose of determining whether the provisions of an order or notice under Section 6 of the Counter Inflation Act 1973 are being complied with authorised officials of my department and of the Price Commission have powers to enter any land or any premises other than premises used only as a dwelling	Counter Inflation Act 1973, Schedule 4(3) and the Counter-Inflation (Designation of Officers) (No. 2) Order 1973
In connection with the payment of food subsidies, authorised officials may enter any land or any premises other than premises used only as a dwelling	Prices Act 1974, Schedule, Article 2(2)
For the purpose of inspecting and testing the calibration of tanks of vessels, authorised officials may enter any premises, other than premises used only as a private dwelling house, which it is reasonable to enter to gain access to the vessel	European Communities Act 1972, Section 2 and The Calibration of Tanks of Vessels (EEC Requirements) Regulations 1975 – SI 1976, No. 2125

'In addition, the Director-General of Fair Trading has powers under Section 162 of the Consumer Credit Act 1974 to enter any premises other than premises used only as a dwelling.'

Tuesday, 22 June

Fleetwood

Mr. Walter Clegg (North Fylde) spoke of problems created in Fleetwood by the settlement of the Icelandic fisheries dispute and asked if the question of granting development area status to Fleetwood would be reconsidered. He also asked if special measures would be taken to provide employment in Fleetwood for those made redundant by the settlement of the Icelandic fisheries dispute.

Mr. Huckfield answered: 'Fleetwood is already an intermediate area and qualifying investment there is therefore eligible for Regional Development Grants on buildings and also Selective Financial Assistance. The department is negotiating to buy a 10-acre site in Fleetwood and hopes to locate an advance factory in a future programme. The 15,000 sq. ft advance factory on the north east side of Blackpool will be completed early in 1977. I welcome the local council's policy of attracting new industry to the area and the department's Regional Office will do all that it can to assist their efforts. I will keep a close watch on employment in Fleetwood in fishing and ancillary trades.'

New towns

Mr. Eric Moonman (Basildon) asked if the Secretary of State for Industry would take steps to ensure that there is a balanced industrial structure for potential employees in the new towns.

'The New Town Corporations work hard to attract a wide variety of employment to their respective areas,' Mr. Williams replied. 'The Government also keeps a close watch on their needs and we draw the attention of firms to the new towns for suitable projects.'

Small firms information centres

Mr. Richard Wainwright (Colne Valley) asked how many inquiries have been received at each of the small firms information centres in the UK, in each month of this year; and what is the average monthly number of inquiries each respective centre has received since opening.

Mr. Huckfield gave the number of inquiries received by each of the 10 centres in each month of this year, until 31 May, in Table 1 below:

TABLE 1

Centre	Jan.	Feb.	Mar.	Apr.	May
Birmingham	903	774	842	552	637
Bristol	969	856	1,010	668	702
Cardiff	725	667	880	585	712
Glasgow	650	600	639	466	541
Leeds	599	476	628	450	541
London	959	1,008	1,163	639	654
Luton	703	680	807	434	553
Manchester	1,026	811	885	601	741
Newcastle	468	559	699	454	412
Nottingham	528	588	749	482	580

Table 2 provides the average monthly inquiry rate for each centre since its opening and illustrates the increase in the number of inquiries which took place following the commencement of a national advertising campaign in March 1975.

TABLE 2

Centre	From opening to February 1975	March 1975 to May 1976
Birmingham	387	654
Bristol	275	742
Cardiff	277	598
Glasgow	223	475
Leeds	246	492
London	339	829
Luton	324	544
Manchester	335	806
Newcastle	273	465
Nottingham	266	535

Recycled paper

Mr. Ronald Atkins (Preston North) asked if the Secretary of State for Industry had anything further to add to his earlier replies concerning the percentage of paper in the UK that is recycled.

Mr. Williams said: 'In 1974 and 1975 about 27 per cent of the paper and board consumed in the UK was recovered for recycling, not as my earlier reply (*Official Report*, 5 May, Col. 417, *Trade and Industry*, 14 May, page 426) said, made from recycled waste paper. The recently announced scheme of financial assistance for the paper and board industry should encourage it to increase its capacity for recycling waste paper.'

Injuries from fireworks

Mr. John Hannam (Exeter) asked how many injuries there were from fireworks, per 1,000,000 fireworks sold, for each year since 1962.

Mr. Fraser told him that the first year for which this information is available is 1969. The figures for 1969 and subsequent years, for Great Britain as a whole, are as follows:

Year	Sales (millions)	Total injuries	Injuries per million sales
1969	300	1,669	5.6
1970	156	1,164	7.5
1971	162	1,055	6.5
1972	178	1,268	7.1
1973	159	1,209	7.6
1974	155	896	5.8
1975	148	739	5.0

Wednesday, 23 June

State financial aid to industry

Figures were requested by Mr. Tom Litterick (Birmingham, Selly Oak) showing the extent of state financial aid to industry for each year since 1970 up to the latest complete year, showing grants and loans separately for investment grants, local employment grants, initial tax allowances, REP, selective employment premium, export rebates, export credit guarantees, military research and development, industrial training, agriculture, fisheries and forestry.

'The information so far as my own department's responsibilities are concerned is as follows, said Mr. Williams.

£ million at historic prices

	1970/71	1971/72	1972/73	1973/74	1974/75	1975/76
Investment grants	540	461	295	191	101	69
Regional development grants	—	—	8	89	180	185
Local Employment Acts:						
Loans (net)	6	−4	4	−6	−17	−13
Grants	29	33	35	22	19	12
Other	16	12	11	19	16	15
Industry Act (1972)*:						
Loans (net)	—	—	4	30	41	49
Grants	—	—	—	6	21	29
Total	591	502	364	351	381	357

* Includes expenditure now the responsibility of the Scottish and Welsh Offices but excludes the purchase of shares.

Mr. Michael Grylls (North West Surrey) asked for a list of the sources of information publicly available or available in the Library, detailing assistance given to industry under Sections 7 and 8 of the Industry Act 1972 and the dates of publication of the sources containing such information.

Mr. Williams answered: '*Trade and Industry* publishes quarterly information on Section 7 assistance and the accelerated projects scheme. To date four editions 27 June 1975, 17 October 1975, 23 January 1976 and 14 May 1976 have contained this information. Discussions are being held to extend these arrangements to Section 8 Industry Schemes after 6 July 1974.

'In addition the Industry Act annual report published each September provides extensive information on Section 7 and Section 8 assistance.'

Govan Shipbuilders

Mr. Michael Grylls asked how much public money has been committed altogether by the Government to Govan Shipbuilders Ltd.: (a) by means of equity participation and (b) by means of loans; and for the conditions under which these loans were made and the date for their repayment.

Mr. Leslie Huckfield replied: 'The Government owns the whole of the share capital of Govan Shipbuilders Ltd,, which consists of 10 million £1 shares. Loans to date total £23,250,000 in cash terms and my Rt. Hon. Friend has undertaken to provide the company with up to £5,247,000 (1976 survey prices) in further loans. The conditions and repayment terms attached to the loans are set out in Note 7 to the balance sheet of the company's 1975 accounts, a copy of which was placed in the Library of the House on 16 June. In addition, my Rt. Hon. Friend has undertaken that losses which the company may incur during the period of support by HM Government will be met by means of non-repayable grants, which to date have totalled £12,572,185. Continued support for the company is subject to the general conditions which my Rt. Hon. Friend set out in his written answer of 7 August 1975.'

Bermuda Agreement

Mr. Ian Wrigglesworth (Teeside Thornaby) asked the Secretary of State for Trade: 'If he is satisfied that the Bermuda Agreement between the UK and the USA is still an effective instrument for regulating scheduled air services?'

Mr Dell's reply is published on page 12.

Anglo-Romanian trade

Mr. Ian Sproat (Aberdeen South) asked for a statement on the latest developments in Anglo-Romanian trade.

Mr. Meacher said: 'The UK's total visible trade with Romania last year amounted to £73.2 million, of which UK exports accounted for £38.9 million. Provisional figures for the first five months of this year total £35.9 million, of which UK exports accounted for £14.4 million. Romania is this year entering her sixth Five Year Plan and embarking on a major programme of industrialisation which should provide useful opportunities for British exporters. A number of important commercial negotiations are now taking place. These negotiations have been complemented by high level Government discussions during recent months – notably during the visit to Romania last September by my Rt. Hon Friend the member for Huyton, and the visits to Britain by a number of senior Romanian Ministers.'

Thursday, 24 June

Consumer Credit Act

Mr. Nicholas Winterton (Macclesfield) asked why the forms currently being sent to businesses requiring licences to operate under the Consumer Credit Act 1974 also require businesses to state whether they have received a letter from the Race Relations Board or a conciliation committee in which the opinion is expressed that they contravened the Race Relations Acts.

Mr. Fraser answered: 'The Act requires the Director General of Fair Trading, when considering the fitness of an applicant for a licence, to have regard to, inter alia, any evidence tending to show that he has practised discrimination on grounds of race in the carrying on of any business. The questions in the forms are a matter for the Director General and I am asking him to write to the hon Member.'

Sir George Young (Ealing, Acton) asked when the Secretary of State for Prices and Consumer Protection intends to publish the advertising regulations under the Consumer Credit Act 1974.

Mr. Fraser said: 'Because of the need for full consultation, it is not possible to give a precise date for the publication of regulations for the control of advertisements for credit and hire; however it is expected that they will be published before the end of the year.'

Food subsidy programme

Mrs. Sally Oppenheim (Gloucester) referred to her question on 14 June (Trade and Industry *25 June page 774*) *and asked precisely what effect, in percentage terms, the Government's food subsidy programme had on the food index during the period 25 March 1974 to 15 October 1974.*

Mr. Maclennan said: 'Pursuant to the written answer to the hon Member for Gloucester on 14 June, Col 65–6, food subsidies are estimated to have saved 4.6 per cent on the Food Index on 15 October 1974 of which 1.3 per cent related to a continuation of subsidies introduced before 25 March by the previous administration.'

Regional airports

Mr. Ian Wrigglesworth (Teeside, Thornaby) asked if the Secretary of State for Trade would seek the views of local authorities and others concerned on the contribution that regional airports could make to the handling of the future growth of air traffic.

Mr. Dell said: 'The first of two consultation documents designed to facilitate discussions with local authorities and other interested

organisations about airports policy was published last November. This covered the London area. The second, dealing with regional airports has been published today and I am arranging for copies to be placed in the Library and the Vote Office.

'This second document provides a wide range of information about the principal airports in England outside the South East, in Wales and in Scotland and examines the contribution that they might make to the handling of the future growth of air traffic in Great Britain. It takes into account advice from the Civil Aviation Authority on airport development in a number of regions as well as the views received from local authorities, amenity groups and other organisations during the course of preliminary consultations which followed the decision to abandon the Maplin airport project.

'Four main issues appear to the Government to require particular attention: the way in which the regional airports can increase their share of air traffic taking into account studies which have been carried out on the scope for diverting traffic from the London area; the alternative possibilities for the coherent development of the regional airports in the context of a national strategy; the effects of these on aircraft noise disturbance, planning, employment and access; and the future ownership and financing of the regional airports. The development of airports in Scotland, where somewhat different circumstances prevail, and which are considered separately in the document, is also an issue for consultation.

'The document indicates that in general there is no shortage of airport capacity in the regions. It suggests that the natural growth of air traffic at regional airports and the prospect of attracting traffic from the regions which at present uses the London airports might best be encouraged by the concentration of air services at a limited number of airports. It examines a number of alternative ways in which such a policy might affect the development of the regional airports and outlines the possible environmental and other implications of such developments. Consistent with the assessments for the London airports contained in Part 1 of the consultation document, the noise levels forecast for the regional airports generally suggest a reduction in the period to 1990 in the number of people affected by aircraft noise. However, the reduction is less marked than in the London area and in a few cases very large increases in traffic over and above forecast growth levels might lead at some airports to some increase in the number of people affected by aircraft noise. With the possibility that a few regional airports might in the next 15 years develop into important airports with a range of international services, the document considers the merits of such airports being owned and operated by the British Airports Authority.

'The consultations on this document will be conducted jointly by my Department and the Department of the Environment and in respect of Scotland and Wales by my Department and the Scottish and Welsh Offices. It is the Government's intention that all those concerned should have an adequate opportunity to express their views on all aspects relevant to the development of airports. It is proposed to allow about six months for the consultations and the Government will take into account the views expressed in the consultations on both this document and Part 1 before putting proposals to Parliament on future airports policy.'

Mr. Dafydd Wigley (Caernarvon) asked how many flight diversions there were from Bristol Airport, and from Rhoose Airport, Glamorgan, respectively, for each of the last five years.

Mr. Clinton Davis gave the number of diversions of air transport movements from these airports, reported to the Civil Aviation Authority as follows:

	Bristol	Rhoose
1971	47	6
1972	60	6
1973	55	13
1974	44	10
1975	6	3

Postal rates

Mr. Nicholas Winterton asked for a list of the price increases for sending a letter (1st class) less than 2 oz in weight since 1960.

Mr. Huckfield said that, as shown in the Post Office's Annual Report and Accounts, the letter tariff from 1960 until May 1965, for letters weighing up to 1 oz was 3d, and 4½d for up to 2 oz. Tariffs and increases since then are shown below:

Date of increase	Increase	Tariff	Not over
17 May 1965	1d	4d	2 oz
16 Sept. 1968 (a)	1d	5d	4 oz
15 Feb. 1971 (b)	1p (approx.)	3p	4 oz
6 Mar. 1972	—	3p	2 oz
10 Sept. 1973	½p	3½p	2 oz
24 June 1974	1p	4½p	2 oz
17 Mar. 1975	2½p	7p	2 oz
29 Sept. 1975 (c)	1½p	8½p	60g (2.1 oz)

(a) Introduction of two-tier system and first class letter post replacing the former letter and printed paper rates.
(b) Decimalisation of currency.
(c) Metrication of weight steps.

He went on: 'The Post Office has recently announced that, due to the success of the Government's counter-inflation policies and their own internal economies, they will be able to hold letters of up to 100 grams at their present rates till the end of this year. This will have ensured at least 15 months' price stability.'

Kearney and Trecker Marwin

Mr. Michael Grylls (North West Surrey) asked if the Industrial Development Advisory Board had advised in favour or against the incurring of additional expenditure of public funds of £1,900,000 in respect of the scheme of arrangement for Kearney and Trecker Marwin Limited, to be put to the extraordinary general meeting of the company on 29 June 1976.

'The Industrial Development Advisory Board approved my department's proposal to negotiate an arrangement on this basis,' said Mr. Williams.

Mr. Grylls asked: 'How much public money has been committed altogether by the Government to Kearney and Trecker Marwin Limited: (a) by means of equity participation and (b) by means of loans; and what are the conditions under which the loans were made and the date for their repayment?'

Mr. Williams said: 'The Government's commitment to Kearney and Trecker Marwin Ltd. is in the form of a preference shareholding of £235,000 and a guarantee of £250,000 to the company's bankers. The Government holds none of the equity in the company, and has no loans outstanding to it. Secured loans totalling £950,000 were repaid in 1974.'

Regional selective assistance

Mr. Robert Hicks (Bodmin) asked: 'In each year since 1972, on how many occasions financial assistance has been given under Section 7 of the Industry Act 1972 to firms located in the South West assisted areas; what is the total amount of assistance that has been given in each year; and how many jobs have been saved and created as a consequence?'

Mr. Williams listed these offers of regional selective assistance as follows:

Year ending	No.	Value (£'000)	Estimate of new jobs	Estimate of jobs saved
31 Mar. 1973	11	630	700	Nil
31 Mar. 1974	24	595	1,700	300
31 Mar. 1975	29	1,498	1,300	200
31 Mar. 1976	48	1,034	1,400	10

Paid public appointments

Mr. Nigel Forman (Sutton, Carshalton) asked the total cost in salaries and fees of the paid public appointments under the responsibilities of the Secretaries of State for Industry, Trade and Prices and Consumer Protection.

The answers given for total salaries were £471,620 p.a. for the Department of Industry; £319,211 p.a. for the Department of Trade and £212,974 for the Department of Prices and Consumer Protection. Annual totals of fees payable were not readily available.

Friday, 25 June

Trade with Japan

Mr. Roderick MacFarquhar (Belper) asked what specific commodities have been raised by ministers with their Japanese counterparts in discussions of possible limitations on Japanese exports to the United Kingdom; and at how many meetings each item has been raised.

Mr. Meacher answered: 'The Government takes every opportunity of ministerial discussions to stress the seriousness of problems created by Japanese competition for a number of our industries, such as cars, consumer electronic products and ball-bearings; and to impress upon the Japanese authorities the need for continuing restraint in the sectors concerned.'

Mr. MacFarquhar also asked how many times British ministers have raised directly with their Japanese counterparts the UK adverse trade balance with Japan.

Mr. Meacher said: 'This subject has been regularly discussed whenever ministers of the two governments meet together, notably during the visits to Tokyo by my Rt. Hon. Friend the Secretary of State for the Environment

(when Secretary of State for Trade) last September, and by my Rt. Hon. Friend the Secretary of State for Foreign and Commonwealth Affairs last month.'

Mr. MacFarquhar asked what specific steps the Secretary of State for Trade or his department have taken since his appointment to improve the balance of trade with Japan, and what new measures, as opposed to measures initiated by his predecessors, he has adopted since his appointment to attempt to improve the balance of trade with Japan.

Mr. Meacher said: 'My Rt. Hon. Friend has himself discussed issues of Anglo-Japanese trade with the Japanese Ambassador, and officials of my department are in regular contact with the Japanese authorities about the import of specific products which cause concern to British industry. It was with my Rt. Hon. Friend's strong encouragement that the EEC delegation which visited Tokyo earlier this month laid particular emphasis on the trade deficit. This year the Exports to Japan Unit of my Department expects to support 22 outward missions; nine exhibitions at the British Export Marketing Centre in Tokyo; and five other joint ventures at International Trade Fairs in Japan involving, in all, almost 600 British firms.'

Mr. MacFarquhar then asked: 'How many parliamentary Questions have been answered on problems relating to imports from Japan and imports from countries other than Japan since March 1974.

'Between 14 March 1974 and 18 June 1976 a total of 432 questions on problems relating to imports were answered by my department and of these 31 were in respect of imports from Japan,' said Mr. Meacher.

Multi Fibre Agreement

Mr. Jim Lester (Beeston) asked: 'In view of the fact that more than half the quota under certain heads has been imported during the last three months, what ways are proposed to ensure that quota restrictions are maintained on textile imports from Hong Kong under the MFA agreement?'

Mr. Meacher said: 'Quotas under the agreement between the EEC and Hong Kong are administered by the Hong Kong authorities who allocate the quotas to exporters up to the agreed limits. UK import licences are issued only against authorised export licences to ensure that the quotas are not exceeded. Within the overall quota limits for the year, there are no additional restrictions on the amount which can be imported during a particular period.'

Post Office profits

'What is the latest estimate for the profit of the GPO telecommunications service and for the postal service, respectively, in 1976–77; and what changes in the levels of traffic are anticipated in 1976–77 compared with 1975–76?' asked Mr. Tom King (Bridgwater).

Mr. Huckfield answered: 'Both businesses expect to make a profit this year in line with Government policy to phase out compensation for price restraint, although it is too early to predict the precise outcome. The Post Office tell me that they expect both inland letter traffic and telephone call growth to be higher than last year.'

Assistance to industry

Mr. Grylls asked how much public money has been committed altogether by the Government to Norton Villiers Triumph Ltd., KTM Machine Tools (Holdings) Ltd., and Marathon Shipbuilding Co. Ltd., (a) by means of equity participation and (b) by means of loans; and under what conditions were these loans made and the date for their repayment.

Mr. Williams answered: 'In July 1973 the Government provided assistance totalling £4.872 million to Norton Villiers Triumph Ltd. in the form of a subscription at par for £3.5 million A Redeemable Preference Shares and £1.372 million B Convertable Redeemable Preference Shares of £1 each in that company.

'In December 1975 a loan of £275,000 was made to NVT Engineering Ltd., a subsidiary of Norton Villiers Triumph Ltd., at commercial rates of interest, to be repaid in equal

Government Sales

Ministry of Defence

14 July 1976 Furniture

Location: RAF Stafford

Auctioneers: Arnold and Son, 13 Market Place, Burton-upon-Trent, Staffs DE14 1HD

A small sale of some 300 lots of household furniture and effects which will be sold as single items or in small quantities.

17 July 1976 Furniture

Location: RAF Upwood

Auctioneers: Midland Marts Ltd., PO Box 10, Banbury Stockyard, Banbury, Oxon (tel. 0295-50501)

A sale of some 500 lots of office and household furniture and effects which will be sold as single items or in small quantities.

21 July 1976 Miscellaneous stores

Location: The Embassy Suite, Balkerne Lane, Colchester

Auctioneers: Fenn Wright Garrod Turner (Dept. L), 146 High Street, Colchester, Essex (tel. 0206-46161)

The stores which are lying in various depots in the Colchester area include a Muirhill dumper, Land Rover fire tender, Bedford truck (diesel), lathes and other machine tools, MT spares, electronic equipment, 2-ton cranes. A large quantity of clothing, carpets, rags, crockery, furniture, scrap metal, etc., and many other items.

Catalogues for the above sales which give details of the lots, conditions of sale, viewing times, etc., are available from the auctioneers from two weeks before and up to the day of the sale, price 20p postage and package 10p extra (postal orders only).

Wembley Auction Sales 1975/76

6 July 1976

View Days:	Day preceding and morning of sale
Location:	Department of the Environment Property Services Agency Supplies Division Store India Pavilion Exhibition Grounds Wembley, Middx. Tel. 01-903 2508
Description of Goods:	Office and Miscellaneous Furniture Engineering, Electrical, Canteen, Domestic and Other Equipment
Auctioneers:	Messrs. Fuller, Horsey, Sons and Cassell 52 Bow Lane London EC4M 9ET Tel. 01-248 7954
Catalogue:	Direct from the auctioneer price 10p each

ENCIRCLE TI 108 ON PAGE 59 FOR FURTHER INFORMATION

tranches on 31 December in each of the years 1978, 1979 and 1980. The charges on NVT Engineering Ltd are held pari passu with Barclays Bank.'

'The Government holds half the equity in KTM Machine Tools (Holdings) Ltd., at a cost to public funds of £777,041, and has preference shareholdings of £4,172,200. The Government has made no loans to the company.

'In August 1972 a loan of £6 million was made to Marathon Shipbuilding Co. (UK) Ltd. This was interest free for three years and then at 6 per cent.

'In December 1974 £2 million of the loan was converted into non cumulative preference shares. The repayment of the remainder of the original loan and the interest thereon were deferred for a further year. The capital sum is repayable in half yearly instalments of £400,000 commencing 30 September 1977.'

Mr. Grylls asked: 'What is the annual rate of interest payable by International Computers Limited on the £40 million for general research and development support, payable up to September 1976, and the £3.5 million for various cost shared development contracts, which has been committed by the Government; whether this interest has yet been paid; and how much of the capital sum has yet been repaid to his department out of sales and profits?'

Mr. Huckfield said: 'Recovery of the £40 million support payments is calculated on a discounted cash flow rate of return of 10 per cent. The company are to pay my Department any profit before tax in excess of 7½ per cent of turnover earned in the seven company years commencing on 1 October 1977, up to a maximum of 25 per cent of the profit in each year. The repayment period may be shorter if full recovery proves possible before 30 September 1984.

'Recovery of the £3.5 million for development contracts is also based on a discounted cash flow rate of return of 10 per cent. This recovery takes the form of a levy on sales of the products. Most of this will accrue in the future; the amount recovered so far is £0.6 million.'

Wool textile industry

Mr. Kenneth Lomas (Huddersfield West) asked what help has been given to the woollen textile industry in West Yorkshire during the last six months and in what form this help has been granted.

Mr. Williams said that in the six months ending on 31 May 1976 offers made and accepted under the wool textile scheme and grants paid to firms in the Yorkshire and Humberside Region were as follows:

He said that grants under Category 1 are paid at the rate of 15 per cent of expenditure on equipment; grants under Category 2 at the rate of 20 per cent of expenditure on the re-equipment element, 20 per cent of expenditure of building and adaptations and 30 per cent of expenditure on new buildings. The amount paid out under realisation is compensation to firms either closing down completely or closing down production units.

Mr. Lomas said that many woollen textile mills are having to shut down in Huddersfield and other parts of West Yorkshire and asked what the Secretary of State for Industry intends to do about the situation.

'Since 1 January 1976 my department has been notified of six closures of wool textile firms,' said Mr. Williams. 'Four of these have closed down and two more are expected to close next month, but this compares with 32 closures of wool textile firms in West Yorkshire last year. I am considering proposals from the Wool Textile EDC for further assistance to the industry from public funds and I hope to be able to respond to them soon.'

'What is the policy of the Government towards the woollen textile industry?' asked Mr. Lomas.

'The contribution made by the wool textile industry to the national economy both through its export performance over many years and the high proportion of domestic demand which it supplies is fully recognised by the Government,' said Mr. Williams. 'This is demonstrated by the industry scheme for wool textiles, announced in 1973, which was the first of its kind and provided £18 million in support of the £80 million of investment which the scheme has generated. The wool textile industry is also one of the sectors included in the government's industrial strategy. The industry's recent export performance has shown a considerable improvement and employment in the industry has been rising since the beginning of the year.'

Mr. Lomas asked 'How much would it cost to make the woollen textile industry viable?'

'The wool textile industry, through the £80 million of investment it is making under the industry scheme for wool textiles, has demonstrated its belief in its own future viability,' said Mr. Williams. 'I share that belief.'

Public appointments

Mr. Nigel Forman asked for lists of the names and previous occupations of all those appointed to the public bodies by the Secretaries of State for Industry, Trade, Prices and Consumer Protection.

Mr. Huckfield gave the following information:

Name of body	Previous occupation
British Steel Corporation	
Sir Montague Finniston	Managing Director, International Research and Development Ltd.
Mr. R. Smith	General Secretary, Union of Post Office Workers
Lord Layton	Managing Director, The Steel Company of Wales

	Category 1	Category 2	Realisation	Total
Offers	10	17	—	27
Gross estimated expenditure on equipment	£1.78 million	£6.02 million	—	£7.80 million
on buildings	—	£3.07 million	—	£3.07 million
Grants paid on projects previously approved	£0.16 million	£0.67 million	—	£0.83 million
Payments to firms closing down	—	—	29	£0.60 million
				£1.43 million

Name of body	Previous occupation
Mr. L. R. P. Pugh Mr. R. Scholey Mr. D. G. S. Waterstone	Corporation employees
Cable and Wireless Ltd.	
Mr. A. A. Willett Mr. R. A. Rice Mr. W. H. Davies Mr. P. A. McCunn Mr. R. W. Cannon	Cable and Wireless Ltd. employees
National Enterprise Board	
Lord Ryder	Chairman, Reed International Ltd.
Mr. L. F. Murphy	Deputy Chairman, Schroders Ltd.
Post Office	
Sir William Ryland	Civil servant
Sir Edward Fennessy	Managing Director, The Plessey Electronics Group
Prof. J. H. H. Merrinan	Civil servant
Mr. K. M. Young	Director, GEC (Management) Ltd.
Mr. A. Currall	Civil servant
Mr. A. E. Singer	Deputy Managing Director, Tesco Stores (Holdings) Ltd.
Mr. M. Elderfield	Director of Finance and Administration Southern Water Authority
National Research Development Corporation	
Mr. W. Makinson	Group Joint Managing Director, The Pullin Group
National Computing Centre	
Mr. D. Firnberg	Head of David Firnberg Associates

Mr. Clinton Davis gave the following information:

Name of body	Previous occupation
British Airports Authority	
Mr. N. J. Payne Mr. D. W. Turner Mr. K. B. Walter	Authority employees
British Airways Board	
Mr. H. E. Marking	Chairman, British European Airways
Mr. J. R. Stainton	Chairman, British Overseas Airways Corporation
Mr. S. F. Wheatcroft	Aviation consultant
Mr. C. A. Herring Mr. H. T. H. M. Phelps Mr. R. Watts	Employees of the board or its predecessors
Mr. K. G. Wilkinson	Vice-Chairman, Rolls-Royce (1971) Ltd.
Civil Aviation Authority	
Lord Boyd Carpenter	Member of Parliament
Mr. R. R. Goodison	Civil servant
Mr. R. Colegate Mr. H. C. Partridge Mr. M. H. Vivian	Authority employees
Air Marshal Sir Ivor Broom	Deputy Controller, National Air Traffic Services
National Film Finance Corporation	
Sir John Terry	Secretary to the corporation

Mr. Fraser gave the following information:

Name of body	Previous occupation
Monopolies and Mergers Commission	
Mr. J. G. le Quesne	Barrister-at-Law
Price Commission	
Sir Arthur Cockfield	Civil servant

The above information is in respect of full-time posts

Letters to the Editor

Letters to the Editor should be addressed to the Editor, *Trade and Industry*, Room 437, 1 Victoria Street, London SW1H 0ET, and *not* to HMSO.

Publications

The Japanese Competitor, by Henry Stokes. (251 pages. The Financial Times Ltd., 10 Bolt Court, London EC4A 3HL. 1976. £50.00. ISBN 0 900671 57 2.) The primary importance of Japan, both as a market and a trading competitor, has not, until recently, been reflected in the literature available to the UK businessman. The author of this new report, who has lived and worked in Japan and is fully conversant with the Japanese business world, has included a wealth of statistical data in order to give substance to the study's findings. The publication's first chapter is concerned with finance and explores such topics as the securities market, Japanese accounting, corporate finance, the Commercial Code and consolidation, dividend policy, foreign direct investment and foreign banking in Japan and insurance. Of particular interest in this finance section is an extensive examination of the Japanese competitor as such. The importance of market share in Japanese corporate strategy is examined together with profitability. As in most of the study's sections, these considerations are illustrated by company case histories. Chapter two provides an extensive survey of Japanese industry, beginning with productivity, profits, and industrial groups. The author then analyses the complex relationship between government, business and the Ministry of International Trade and Industry (MITI) and this is followed by the study of a further crucial relationship – that between foreign trade and industrial structure. Specific industries examined in chapter two are steel, chemicals, paper and pulp, aluminium and other non-ferrous metals, textiles, foodstuffs, autos and transport machinery, electronics, general machinery, precision machinery and, finally, marine transport. Foreign trade in all its aspects is dealt with in chapter three. The key section in this chapter is a very detailed and well illustrated discussion of the White Paper on International Trade published by MITI in 1975. The section on trade with the European community will be of particular interest to United Kingdom readers. Chapter four surveys Japanese direct investment overseas and includes both an overview of Japan and Asia in general and an examination of Thailand, Malaysia and Singapore in particular. This final chapter concludes with a concise outline of the 'Japanese point of view'. All of the above mentioned chapters contain summaries. The usefulness of this report is further enhanced by the inclusion of a postscript which follows chapter four and up dates some of the main features to early 1976. This last item is supplemented by appendix one which consists of a detailed survey of developments during 1974-75, with special reference to Japanese investment overseas together with foreign mergers. Appendices two and three comprise a list of the author's interviews and meetings and an index of company names respectively. As a further aid to firms concerned with the Japanese market a series of *Japanese Market Reports* have been prepared for the British Overseas Trade Board. Details of price, availability and coverage can be obtained from the Export to Japan Unit, Room 606, Export House, 50 Ludgate Hill, London EC4M 7HU.

Annual investments in fixed assets in the industrial enterprises of the member countries of the European Community, 1971-73. Statistical Office of the European Communities: Statistical Studies and Surveys, 1975/2. (114 pages. Available from HMSO. 1976. £2.80. ISBN 0 11 935335 0.) This bulletin presents the results of the annual inquiry into capital investment in the EEC member states for the year 1973, and also includes comparable data for both 1971 and 1972. Detailed notes introduce the text and provide guidance on the background, scope and coverage of the data. The first section of the tabulations contain the detailed results, for each member state, of the inquiries for 1971, 1972, and 1973. The results are given in national currencies and subdivided by NACE (General Industrial Classification of Economic Activities within the European Community) groups and classes according to the nature of the capital goods invested. The second part of the bulletin is devoted to the presentation of community level data, again classified by NACE, but expressed in units of account of the European Communities (Eur). This community information is followed by notes dealing chiefly with the aggregations of headings made by member states and by the EEC Statistical Office in order to secure uniformity of presentation. It is worth noting that the inquiries are not conducted by the Statistical Office of the European Communities (SOEC) itself but are undertaken by the competent national body and then transmitted to SOEC in an agreed form. In the case of the UK, the data is culled from the annual Census of Production inquiry conducted by the Business Statistics Office, Newport. It must be remembered that there are discrepancies between the correlations employed by the SO and SOEC.

Guide to short term statistics of manufacturer's sales: Business Monitor PQ1001. Department of Industry. Business Statistics Office. (30 pages. HMSO. 1976. £0.85. ISBN 0 11 511721 0.) *Business Monitors* are the medium through which the Government publishes the business statistics it gathers on the manufacturing, mining, distributive and service industries. Monitors in the quarterly production series provide comprehensive, up to date, detailed sales data for over four thousand individual products manufactured by firms in some one hundred and sixty industries. Other relevant information on imports and exports, employment, wholesale and retail prices, is included if available. Monthly production monitors are more limited in coverage: their information is obtained from a few selected industries and are used as summary figures by the government as a monthly measure of movements in the economy. This particular publication provides a general outline of the inquiries on which the *Business Monitor* series are based and includes a section on the methods used, covering such aspects as planning, collection, estimation, compilation of tables and interpretation. The guide also includes lists of all the monitors in the quarterly and monthly series and gives details of their contents. A useful complement to *PQ1001* is provided by the *Index of Commodities to the Quarterly Statistics of Manufacturers' sales: PQ1000.* (HMSO £0.46). This index lists each product covered and gives the number of the *Business Monitor* relating to it.

A Century of Trade Marks 1876-1976. Patent Office: Department of Trade. (56 pages. HMSO. 1976. £2.00. ISBN 0 11 511719 9.) In order to mark the centennial of the Trade Marks Registry, the Assistant Registrar, with the help of two of his colleagues, has produced this commentary on the work and history of that institution. The first two chapters deal with the origins of both trade marks and trade mark law. Chapter three traces the subsequent development of trade mark law and, in particular, examines the Trade Marks Registration Act of 1875 by which trade marks were accorded statutory recognition. This legislation also established the Registry and it is the history of that body which forms the subject of chapter four. The next chapter is devoted to a study of the branch registry in Manchester and the importance of textiles in its evolution. Also included in this chapter is a history of trade marks in Sheffield and the special relationship with the Cutler's Company. Chapter six is a short discourse on trade marks as footnotes to social history. Although this publication is mainly historical in character the concluding chapter does venture a glimpse into the future: after many years of relative stability, both in the law and practice of trade marks, the Registry is entering a period when its work will be influenced, much more than hitherto, by international developments.

Computer Services 1975-76. Lloyd's Register of Shipping. (24 pages. Lloyd's Register of Shipping, 71 Fenchurch Street, London EC3M 4BS. 1976. Free.) *Lloyd's Register* provides a technical inspection and advisory service, primarily for ships and offshore structures, but increasingly for a variety of both marine and non-marine engineering projects. This newly updated booklet contains detailed information on the computer services used in conjunction with these activities. Included are lists of the computer hardware details of the computing systems, together with an outline of technical programmes and routines. Full addresses of *Lloyd's Register* overseas offices are also given.

European Community News

Trade provisions of EEC's Maghreb agreements enter into force

The interim trade provisions contained in co-operation agreements between the community and the three Maghreb countries – Algeria, Morocco and Tunisia – entered into force yesterday (1 July). The agreements, which form part of the community's overall approach to relations with countries bordering the Mediterranean, were signed at the end of April this year. They include provision for financial and technical co-operation, as well as for preferential trading terms.

EEC and Maghreb countries

Trade provisions

In the industrial sector – generally Chapters 25 to 99 of the common customs tariff (CCT) – all goods of the Maghreb countries will enter the community free of customs duties, except for goods of the heading 45.01 (natural cork, unworked, crushed, granulated or ground; waste cork). Duty-free entry is limited in the case of refined petroleum products of Chapter 27 and cork products of tariff headings 45.02, 45.03 and 45.04, by annual community ceilings above which duties may be reimposed for the rest of the year.

In the agricultural sector – generally Chapters 1 to 24 – concessions ranging from 20 per cent to 100 per cent, cover, mainly, certain fruits and vegetables, fruit juices, fish and wines. For certain designated wines CCT duties will be suspended entirely within the limits of an annual tariff quota. Reduced rates of duty will be applicable to imports of apricot pulp from Morocco and Tunisia within the limits of annual tariff quotas. Concessions in the agricultural sector cover about 80 per cent of community imports of agricultural products from the Maghreb countries.

Community exports of all goods to the Maghreb countries will receive most-favoured nation treatment.

The agreements will include provisions relating to dumping and non-discrimination, and to safeguard measures which can be taken by the community or any Maghreb country in the event of serious economic disturbance.

The trade provisions are being implemented in advance, pending ratification of the full co-operation agreements by all the contracting parties.

Rules of origin

A protocol annexed to each agreement defines 'originating products' as goods 'wholly obtained' within the member states of the community or the Maghreb countries, or goods having undergone 'sufficient working or processing' within the member states or the Maghreb countries.

Normally, 'working or processing' is considered sufficient when, as a result of the working or processing, the finished products may be classified under a different tariff heading from the materials and parts used. This is known as the change of tariff heading rule.

There are, however, a number of exceptions to this rule which are specified in Lists A and B to the protocol. List A covers products which, in addition to the simple 'change of tariff heading' rule, have also to meet a process rule. List B provides that the products listed need not meet the simple change of tariff heading rule but must satisfy a process rule.

The protocol also enables products originating in any member state of the community or in any of the Maghreb countries to be regarded as wholly obtained where they have been further worked or processed in any other member state or in any other Maghreb country.

The origin rules must be satisfied if preferential rates of duty are claimed. Evidence of orginating status will be given by means of a movement certificate, form EUR. 1, issued by the customs authorities of the exporting country, or by a form EUR.2 in respect of postal consignments not exceeding 1,000 units of account (ua) (about £620) in value. Further details will be available shortly in customs notice no. 882.

Financial and technical co-operation

Each agreement has its own financial protocol which provides for community participation, through financial and technical co-operation, in projects contributing to economic and social development of the Maghreb countries.

Capital projects designed to promote industrialisation or modernise agriculture will be eligible for loans from the European Investment Bank and technical co-operation by the community in work associated with such projects, especially training, may be financed by grants.

For these purposes the EEC will make available a total of 114 million ua for Algeria, 130 mua for Morocco and 95 mua for Tunisia: in each case the sums will comprise EIB loans plus aid elements contributed by member States.

EEC aims for growth target of 5 per cent, 1976-80

Economic policies should be directed at achieving the conditions that sustain and balance growth in all the regions of the community over the coming years in order to speed up the absorption of unemployment and a return to full employment by 1980. This was one of the conclusions of the second EEC tripartite conference held in Luxembourg on 24 June (see 25 June issue of *Trade and Industry*)

The delegates – from government and both sides of industry – agreed that the scale of this growth would depend on the circumstances in member states, but, for the community as a whole, the average annual growth rate should be approximately 5 per cent for the period 1976-80. This would require a greater increase in investments and particularly in investments which create new jobs.

In order to attain these targets, joint and co-ordinated efforts would have to be made by the governments, employers and labour and by community institutions.

The conference also noted that the policy of regular and lasting growth pre-supposed that any suitable measures to avoid further inflationary tendencies should be taken in good time.

Appointment of EIB management committee

The board of governors of the European Investment Bank, held its annual meeting on 23 June at Luxembourg, under the chairmanship of the governor for the United Kingdom. Denis Healey, Chancellor of the Exchequer.

The board, which is composed of the finance ministers of the nine EEC member states approved the bank's annual report for 1975 including the profit and loss account, presented for the board of directors by Yves Le Portz, the Bank's President. The governors went on to appoint the management committee for the next statutory period of six years.

From 24 June the governor for Belgium, Willy de Clercq, Minister of Finance, takes the chairmanship of the board of governors for one year, until the next annual meeting.

Agreement reached on imports of New Zealand butter

Details of the EEC Ministers' agreement on New Zealand butter imports were announced in the Commons on 22 June by Fred Peart, Minister of Agriculture, Fisheries and Food.

At their council meeting in Luxembourg on 21 June, agricultural ministers of the Nine agreed on arrangements which, Mr. Peart said, carry out fully and satisfactorily, the understandings secured at the European council in Dublin last year.

He explained under these arrangements, the quantities which may be imported from New Zealand in 1978, 1979 and 1980 are 125, 120 and 115 thousand tonnes, respectively, and that these were firm and fixed quantities.

'Within these fixed quantities, there are arrangements under which some butter may be diverted, if necessary, from the fresh market into food manufacture. This will apply only to imports in excess of 25 per cent of our butter market in the preceding year. It will not affect New Zealand's total entitlement or her financial return.

'Finally', Mr. Peart said, 'the council made a statement confirming that Protocol 18 remains the basis for continuing imports of New Zealand butter after 1980. The commission will make a report in 1978, and this will serve as a basis for further decisions on these continuing arrangements.'

He explained that he had kept in close touch with the New Zealand authorities during the negotiations and that New Zealand fully agreed that the settlement reached took account of their essential interests both up to 1980 and afterwards.

European social fund: The commission's first allocations in 1976

The EEC commission has recently published information about its first decisions in 1976 on allocations from the European social fund. These include allocations to the United Kingdom totalling about £0.5 million.

The fund contribution covers training by the Training Services Agency under its training opportunities scheme of ex-agricultural workers in Great Britain; the operation by a voluntary organisation in Great Britain working in the field of assistance for disabled people of an assessment centre for handicapped young people; and assistance to two companies in Northern Ireland with training schemes supported by the Department of Manpower Services.

These are some of the UK's smaller applications for 1976. Some £17.8 million had already been allocated to the UK for 1976 under commission decisions made in 1975. The remainder of the UK's applications are being considered by the commission's social fund advisory committee at a meeting held last week (25 June) and at another session scheduled for early November.

More on the EEC

Information on EEC matters and about member states can often be found in other sections of 'Trade and Industry'. For this week's additional news, turn to the following pages:

Home News
Europe's most modern car plant 5

Parliament
European aerospace industry 16
Food subsidy programme 19
Multi Fibre Agreement 21

Publications
The Japanese competitor 23
Annual investments in fixed assets in industrial enterprises of EC 23

Exhibitions
Optimism at Bergbau 34
British firms at Achema 35

Trade Information
Edmund Dell welcomes renewal of OECD Trade Pledge 38
Import Duties Orders 38
Export quota for ferrous scrap outside EEC 38

Tariff and Trade Notices
Iceland: increased special goods tax 39
Italy: economic measures; exchange deposit scheme 39

Statistics
Registrations of British, community and foreign films 52

EEC regulation on drivers' hours deferred

John Gilbert, Minister for Transport, announced on 24 June that the EEC commission had agreed to defer the application of the EEC drivers' hours rules* to UK goods and passenger vehicles on internal journeys for eight months beyond 30 June, when the previous period of deferment ended. The new deferment was given legal effect by The Community Drivers' Hours Rules (Deferment of Operation) Regulation 1976, which came into operation on 1 July.

The granting of deferment, which was requested by the minister in June means that there will be no immediate change to the maximum hours of driving and minimum rest period of drivers of lorries, buses and coaches engaged in domestic UK journeys. During the eight months' period the commission's proposals for altering 543/69 will continue to be considered.

The deferment does not concern Article 5 of Regulation 543/69, relating to the minimum ages of drivers, which was brought into effect in April of this year under the Road Traffic (Drivers' Ages and Hours of Work) Act 1976.

The other two new EEC member states, Ireland and Denmark, have been granted a period of deferment of eight and seven months, respectively.

* Contained in Regulation 543/69.

New EC Legislation

The legislation listed below has been published in the *Official Journal of the European Communities* as indicated against each item. The *Official Journal* is now published in English and copies should be obtained from HMSO. Information about the items listed, in so far as other member states' requirements are concerned, is available to British exporters from Department of Trade, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU (tel. 01-248 5757, ext. 7174/482/408). Other information may be obtained from the reference point given at the end of the item.

Common agricultural policy

The texts of the following regulations which affect the various agricultural sectors in the EEC have been published in the *Official Journal of the European Communities*:

Oils, fats and oilseeds. Regulation (EEC) 1362/76 relating to use of the tendering procedure for fixing levies on olive oil (*Official Journal* L154, 15 June 1976).

Wine. Regulation (EEC) 1379/76 amending Regulation (EEC) 1120/75 as regards the period of validity of the certificates of designation of origin of certain wines imported from Portugal (*Official Journal* L156, 17 June 1976).

Milk and milk products. Regulation (EEC) 1380/76 amending Regulation (EEC) 1579/70 laying down special conditions for the export of certain cheeses to Spain (*Official Journal* L156, 17 June 1976).

Cereals and rice. Regulation (EEC) 1381/76 amending for the sixth time Regulation (EEC) 2042/75 on special detailed rules for the application of the system of import and export licences for cereals and rice (*Official Journal* L156, 17 June 1976).

Imports from non-member states

The *Official Journal of the European Communities* L154, 15 June 1976, contains the texts of the following decisions:

Decision 76/528/EEC authorising Italy not to apply community treatment to certain pullovers of synthetic textile fibres falling within heading No. ex 60.05 of the common customs tariff, originating in Korea and in free circulation in the other member states.

Decision 76/529/EEC authorising Italy not to apply community treatment to unbleached woven fabrics of cotton, other than cotton gauze or terry towelling and similar terry fabrics, falling within heading No. ex 55.09 of the common customs tariff, originating in China and in free circulation in the other member states.

Decision 76/530/EEC authorising Italy not to apply community treatment to footwear with uppers of leather for sports and gymnastics, other than ski-boots, falling within subheading 64.02 ex A of the common customs tariff, originating in Hungary and in free circulation in the other member states.

Decision 76/531/EEC authorising Italy not to apply community treatment to woven fabrics of silk, unbleached, falling within heading No. ex 50.09 of the common customs tariff, originating in China and in free circulation in the other member states.

Applications for copies of the 'Official Journal of the European Communities' containing the legislation referred to should be made to HMSO and not to the inquiry points given in the notices.

Wheat, barley and oats: guarantee arrangements ended

An order* laid before Parliament on 21 June, coming into operation on 1 August 1976, terminates the United Kingdom guarantee arrangements for wheat, barley and oats.

This follows the Commons announcement by Fred Peart, Minister of Agriculture, Fisheries and Food, on 8 March that the United Kingdom guarantees for cereals were being terminated at the end of July under the terms of the Act of Accession. Article 54 of the act stipulates that the guarantees must end once they are equalled or exceeded by United Kingdom support prices under the common agricultural policy.

* Common Agricultural Policy (Termination of Guarantee Arrangements) (Wheat, Barley and Oats) Order 1976 (SI 1976 No. 918). Copies can be obtained from HM Stationery Office, price 8p, by post 14½p.

Commission to create equal opportunities bureau

The European commission has decided to set up a women's bureau, Dr. Patrick Hillery commissioner for social affairs told the European parliament on 17 June.

The bureau, he said, would come within the framework of the social affairs directorate-general. A press conference would be held in September to provide information on the objectives and programmes of the new department.

Suspension of CCT on aircraft parts

Applications have been made to the EEC commission for total suspension of the common customs tariff (CCT) duty from 1 January 1977 on the parts and components for the maintenance and repair of aeroplanes of an unladen weight exceeding 15,000kg. listed in the schedule below.

If any UK producers consider that they can, or will be able to supply any of the items, or that a suspension of duty for any of them would be detrimental to their interests, they should inform the Department of Trade, General Division, Kingsgate House, 66-74 Victoria Street, London SW1E 6SJ, tel. 01-215 5515.

Representations should be received by 16 July.

CCT tariff heading	Description	Aeroplane concerned
84.61 B	Valves for the	
	—fuel system	F.27
	—water/methanol system	
	—de-icing system	
85.01 AII	Generators (28V, 375 amp, 10.5KVA)	F.27
	Inverters (115V, 400Hz, 1,800VA or 250VA)	F.27
	Alternators (120/208VA, 15KVA)	F.27
	Actuators for controlling flaps and heat exchanger	F.27
85.08 A	High energy ignition units	F.27
90.14 B	Cabin altimeter and differential pressure gauge	F.27
	Cabin rate of climb indicator	F.27
90.28 A	Voltage regulators transistorised	F.27
	Servo-assisted anemometer	Concorde
90.28 B	Transducer (stall warning)	F.27

EEC aid for UK coal and steel firms

New allocations of community aid worth a total of £981,625 for the UK coal and steel industries have been announced by the commission.

The first is a loan of £950,000 (1.64 million units of account) for the London firm, Natural Gas Tubes Ltd., towards the construction of a new factory for welded steel tubes in the industrial zone of Tafarnuabach, Ebbw Vale. The total cost of the investment, which, it is estimated, will create 120 new jobs, is £2.906 million. Taking account of the jobs created, the rate of interest on the loan will be reduced for the first five years.

The second allocation takes the form of a non-repayable grant of £31,625 towards the readaptation of 63 workers as the IMI Alloy Steels factory in Alfreton, Derbyshire.

Both the loan and the grant have been made under Article 56 of the European Coal and Steel Community Treaty which authorises the commission to contribute towards investments creating new jobs in regions where closures have created substantial unemployment in the coal and steel sectors, and to provide assistance for redundant coal and steel workers.

Economic Indicators of the EEC

These tables have been prepared for the convenience of users who do not have access to the sources themselves; international publications (as indicated) have been used, supplemented by later reports where possible. In addition to the member states of the EEC, the United States and Japan have been included for comparison.

The form of presentation adopted – indicators by subject – is for convenience only, and it must not be assumed that the indicators in the same table for different countries are strictly comparable. An attempt has been made to indicate major differences of definition, but the coverage and methods of collection vary considerably; this is partly due to different administrative procedures in various countries. Fuller details may be obtained from the sources indicated, and from the national publications of the countries concerned.

An extensive bibliography – 'Sources of Statistics: 2. The European Economic Community' – which lists publications in the Statistics and Market Intelligence Library of the Department of Trade, is obtainable on request to the library at Export House, 50 Ludgate Hill, London EC4M 7HU (tel. 01-248 5757, ext. 368). 'Statistical News' No. 21 (May 1973), published by the Central Statistical Office, contains a selected bibliography of statistical publications of the commission of the European communities.

TABLE 1 Industrial Production (Excluding construction) Seasonally adjusted — Indices 1970 = 100

	Belgium	Luxem-bourg	France[1]	German F.R.	Ireland[2]	Italy	Nether-lands	United Kingdom	EEC[3]	*United States*	*Japan*
Weights in EEC	3.9	0.3	18.1	39.9	0.6	13.3	4.5	19.4	100.0	—	—
Weights in total	1.3	0.1	6.0	13.2	0.2	4.4	1.5	6.4	33.1	*43.3*	*11.9*
1970	100	100	100	100	100	100	100	100	100	*100*	*100*
1971	103	99	104	102	105	100	106	100	102	*100*	*103*
1972	109	103	112	106	109	104	111	102	106	*108*	*110*
1973	116	115	120	113	119	114	118	111	115	*118*	*127*
1974	120	119	123	112	123	119	121	108	116	*117*	*124*
1975	108	93	112	105	115	108	115	102	107 (e)	*107*	*110*
1974 1st quarter	122	124	125	115	127	123	122	105	116	*117*	*130*
2nd quarter	122	119	126	113	124	125	122	109	117	*118*	*127*
3rd quarter	120	120	126	111	121	119	123	110	116	*118*	*122*
4th quarter	116	113	118	109	119	111	120	107	111	*114*	*115*
1975 1st quarter	112	103	114	106	116	110	117	107	109	*105*	*106*
2nd quarter	108	92	111	104	114	107	114	101	105	*103*	*110*
3rd quarter	103	82	111	103	114	106	111	100	104	*107*	*112*
4th quarter	109	95	114	108	116	110	119	102	109	*110*	*113*
1976 1st quarter	117	98	120	111		113 (e)	120	103		*113*	*119*
1974 December	111	107	114	106		106	116	104	108	*110*	*112*
1975 January	113	104	115	104		110	116	108	108	*107*	*107*
February	111	101	115	105		113	116	107	109	*104*	*105*
March	109	102	112	105		108	118	105	108	*103*	*105*
April	111	93	112	102		109	113	103	105	*103*	*109*
May	105	84	108	106		103	114	100	105	*103*	*110*
June	111	96	112	103		109	114	100	106	*104*	*111*
July	101	90	110	99		110	109	101	103	*105*	*114*
August	100	61	110	104		98	111	99	103	*107*	*112*
September	107	96	111	106		110	114	101	106	*109*	*114*
October	109	89	113	107		112	116	102	108	*109*	*114*
November	110	98	113	109		113	122	102	109	*110*	*112*
December	107	98	117	109		108	120	101	109	*111*	*114*
1976 January	111	97	120	110		110	120	102	111 (e)	*112*	*116*
February	114	98	119	114		117	120	103	112 (e)	*113*	*119*
March	126	99	121	110		116 (e)	119	102		*114*	*123*
April			122 (e)	110 (e)		120 (e)		104		*115*	*126* (e)
May										*115* (e)	
% change latest three months:											
On previous three months	7.7	3.2	3.4	1.8	1.8	6.7	0.3	1.3	2.8	*2.4*	*7.6*
On a year earlier	5.4	−4.2	6.8	7.1	−2.5	7.0	2.6	−1.9	2.2	*11.3*	*15.4*

[1] Excluding clothing, wood products and furniture. [2] Mining and manufacturing only. [3] Excluding Denmark. (e) Estimated.

Source: 'OECD Main Economic Indicators'

Do you use statistics?

The Government Statistical Service (GSS) prepares a wide range of reliable and detailed figures on the United Kingdom. It is usually worth checking to see if what you want is available from them. You can see many government statistical publications at your local public library, buy them from HMSO or refer to the comprehensive collection held at the Statistics and Market Intelligence Library, Export House, 50 Ludgate Hill, London EC4N 7HU (tel. 01-248 5757 ext. 368).

A free pamphlet, *Government Statistics – a brief guide to sources*, gives up-to-date contact points in Departments for further information. You can obtain copies from regional offices of the Department of Industry or by writing to the Central Statistical Office Press and Information Service, Great George Street, London SW1P 3AQ.

TABLE 2 Unemployment seasonally adjusted

Indices 1970 = 100

	Belgium[1,2]	Denmark[1,3]	France[2,4]	German F.R.[5]	Ireland[1]	Italy[4]	Netherlands[2,5]	Great Britain[5]	*United States*[6]	*Japan*[7]
1971	100	125	129	126	100	100	135	129	*122*	*111*
1972	123	125	145	166	114	113	235	142	*118*	*119*
1973	130	84	150	184	104	109	239	102	*105*	*107*
1974	148	186	190	391	114	91	293	101	*124*	*117*
1975	249	430	321	721	179	106	424	157	*192*	*177*
1974 1st quarter	131	81	168	317	102	89	263	96	*112*	*107*
2nd quarter	137	135	169	344	110	86	270	97	*113*	*111*
3rd quarter	151	208	181	409	117	90	302	104	*126*	*118*
4th quarter	172	323	235	547	133	98	337	107	*150*	*143*
1975 1st quarter	199	420	279	684	164	90	378	123	*183*	*152*
2nd quarter	239	423	319	720	179	118	413	143	*198*	*180*
3rd quarter	269	410	335	745	186	106	450	170	*196*	*196*
4th quarter	296	463	350	766	190	113	459	190	*194*	*200*
1976 1st quarter	294	463	357	780		101	452	207	*175*	*152*
1974 November	172	327	240	566	133		343	109	*147*	*142*
December	179	338	252	548	140		354		*162*	*156*
1975 January	186	426	267	666	157	90	367	120	*184*	*149*
February	197	403	278	693	167		378	125	*180*	*151*
March	213	434	292	693	169		389	128	*190*	*156*
April	227	451	304	717	174	118	407	135	*194*	*161*
May	239	418	319	716	179		411	143	*202*	*165*
June	254	399	335	728	183		420	151	*197*	*167*
July	258	355	338	747	186	106	439	164	*198*	*194*
August	269	433	330	752	183		450	168	*194*	*195*
September	280	445	337	736	188		456	175	*195*	*199*
October	297	454	344	760	190	113	459	184	*198*	*200*
November	297	448	353	763	190		459	191	*194*	*199*
December	293	489	352	774	193		459	199	*189*	*202*
1976 January	289	476	354	797	195	101	452	205	*178*	*158*
February	292	471	353	801	198		461	209	*175*	*150*
March	303	442	363	743			446	208	*172*	*148*
April	311	429	360	738			441	209	*172*	
May				640 (e)				211	*169* (e)	
June								212		
Rate %[8]	5.6	4.1	4.4	3.5	7.3	3.2	4.2	4.7	7.9	1.4
% change latest three months										
On previous three months	3.1	- 5.0	1.6	−10.6	3.2	−10.6	−1.6	1.6	*−5.4*	*−24.1*
On a year earlier	42.2	4.2	23.1	−0.2	26.3	12.2	14.8	47.3	*−12.5*	Nil

Note: Figures of total unemployment and unemployment rates are very sensitive to the particular measures used and the sources from which they are obtained. The figures in this table to a large extent reflect the different administrative systems and social-security provisions of the countries concerned.

[1] Insured unemployed. [2] Change of basis during period. [3] Monthly data are weekly averages. [4] Unfilled applications. [5] GB percent change on year is estimated.
[6] Based on results of sample survey. [7] Unemployment-insurance beneficiaries.
[8] Numbers in latest month available as % of total employees (UK) and of total labour force (others) (1970). (e) Estimated.

Source: 'OECD Main Economic Indicators'.
GB source: 'Monthly Digest of Statistics'.

TABLE 3 Exports (fob) Special trade[1], seasonally adjusted

US$ million[9]

	Belgium/ Luxembourg	Denmark[2]	France	German F.R.	Ireland[2]	Italy	Netherlands	United Kingdom[2]	EEC	*United States*[2]	*Japan*[2]
1970	11,592	3,288	17,940	34,188	1,032	13,188	11,772	19,356	112,356	*43,224*	*19,320*
1971	12,081	3,609	20,592	39,009	1,308	15,177	13,953	22,356	128,084	*44,211*	*23,994*
1972	15,995	4,330	25,739	46,208	1,610	18,535	16,392	24,340	153,152	*49,676*	*28,591*
1973	22,416	6,120	35,952	67,440	2,124	22,236	23,952	28,862	210,684	*71,316*	*36,936*
1974	28,260	7,716	45,900	89,160	2,628	30,288	32,436	37,196	275,100	*98,508*	*55,536*
1975	28,812	8,712	52,212	90,024	3,216	34,824	34,440	41,715	295,992	*107,652*	*55,752*
1974 1st quarter	6,255	1,779	10,452	20,571	597	6,621	7,176	7,939	61,695	*22,326*	*11,442*
2nd quarter	7,311	1,887	11,208	22,761	636	7,197	8,154	9,611	69,066	*24,402*	*13,911*
3rd quarter	7,260	1,977	11,895	22,386	666	8,136	8,559	9,927	71,265	*25,281*	*14,445*
4th quarter	7,296	2,088	12,465	23,337	738	8,181	8,646	9,750	72,849	*26,706*	*15,396*
1975 1st quarter	7,893	2,199	13,557	23,625	771	8,712	8,928	10,842	77,121	*26,840*	*14,907*
2nd quarter	7,035	2,193	13,317	23,133	756	8,454	8,532	10,415	74,442	*25,795*	*13,842*
3rd quarter	6,408	2,055	12,441	21,060	795	8,697	7,869	9,865	69,813	*27,135*	*13,176*
4th quarter	7,227	2,241	12,876	22,356	852	9,015	9,138	10,475	74,865	*28,206*	*14,097*
1976 1st quarter		2,148	13,539	23,583	723		8,985	10,880	76,380 (e)	*26,619*	*15,870*
1974 December	2,307	677	4,537	7,796	269	2,898	2,985	3,228	24,883	*8,841*	*4,898*
1975 January	2,642	737	4,437	7,928	288	2,852	3,014	3,712	25,644	*9,258*	*5,113*
February	2,755	730	4,631	7,952	265	2,909	2,968	3,475	25,965	*8,819*	*4,977*
March	2,496	731	4,491	7,746	218	2,951	2,946	3,794	25,511	*8,773*	*4,817*
April	2,360	738	4,426	7,610	270	2,747	2,952	3,287	24,558	*8,593*	*4,789*
May	2,285	706	4,310	7,354	265	2,785	2,722	3,742	24,404	*8,414*	*4,571*
June	2,388	749	4,581	8,169	221	2,921	2,857	3,384	25,482	*8,788*	*4,481*
July	2,053	707	4,186	7,224	266	2,799	2,655	3,418	23,532	*8,868*	*4,423*
August	2,240	671	4,142	6,704	263	3,031	2,499	3,149	22,902	*9,119*	*4,420*
September	2,116	678	4,114	7,132	265	2,848	2,708	3,298	23,378	*9,147*	*4,333*
October	2,271	806	4,148	7,200	316	2,918	3,008	3,555	24,489	*9,303*	*4,764*
November	2,632	724	4,315	7,764	290	3,182	3,095	3,356	25,591	*9,527*	*4,467*
December	2,324	711	4,414	7,392	246	2,916	3,037	3,562	24,785	*9,376*	*4,849*
1976 January	2,488	768	4,425	7,747	247	3,062	2,903	3,600	25,255	*8,840*	*5,037*
February	2,648	683	4,637	7,692	247	2,591	3,017	3,552	25,501	*8,858*	*5,223*
March		698	4,478	8,145	229	3,037 (e)	3,065	3,719	25,634	*8,920*	*5,609*
April			4,790 (e)	8,067 (e)		2,658 (e)		3,600		*9,380* (e)	
May								3,642			
% change in dollar terms latest three months											
On previous three months	6.3	−4.1	5.7	4.4	−15.1	−9.5	−1.7	2.3	2.0	*−2.1*	*12.7*
On a year earlier	−3.2	−2.2	2.6	2.6	−6.2	−3.7	0.6	1.3	0.9	*3.7*	*6.5*
% change in national currencies latest three months											
On previous three months	5.8	−4.9	10.5	2.1	−7.7	5.2	−0.5	11.1	2.7	*−2.1*	*11.4*
On a year earlier	8.8	8.9	15.6	12.0	18.5	30.3	−0.7	27.9	15.2	*3.7*	*10.3*

[1] For most purposes special trade may be defined as trade excluding re-exports. [2] General trade. [3] Weighted average of percentage changes in national currencies.
[9] All values are expressed in US dollars, making use of IMF parity rates as quoted in 'OECD Main Economic Indicators'.
(e) estimated.

Source: United Kingdom: Department of Trade
All others: 'OECD Series "A"'.

TABLE 4 Imports (cif) Special trade[1], seasonally adjusted

US$ million*

	Belgium/ Luxem-bourg	Den-mark[2]	France	German F.R.	Ireland[2]	Italy	Nether-lands	United Kingdom[2]	EEC	*United States[2, 3]*	*Japan[2]*
1970	11,352	4,380	19,116	29,808	1,572	14,940	13,392	21,720	116,280	*39,960*	*18,876*
1971	12,390	4,476	21,261	34,356	1,838	16,026	15,159	23,897	129,403	*45,633*	*19,716*
1972	14,879	4,986	26,696	39,759	2,113	19,252	17,127	27,831	152,643	*55,819*	*23,463*
1973	21,936	7,704	37,380	54,492	2,784	27,816	24,360	38,884	215,232	*69,120*	*38,316*
1974	29,700	9,852	52,824	68,976	3,816	40,968	33,204	54,486	293,568	*100,968*	*62,112*
1975	30,708	10,332	54,240	74,208	3,804	38,364	35,148	53,695	300,048	*96,936*	*57,864*
1974 1st quarter	6,522	2,331	11,973	15,354	834	9,387	7,197	12,043	65,661	*21,615*	*14,265*
2nd quarter	7,578	2,391	13,251	17,436	996	10,203	8,445	14,269	74,511	*24,951*	*15,891*
3rd quarter	7,485	2,331	13,935	17,865	1,023	11,121	8,835	14,119	76,605	*27,189*	*15,819*
4th quarter	7,290	2,337	13,809	18,345	939	10,314	8,817	14,093	75,951	*27,294*	*16,032*
1975 1st quarter	7,479	2,445	14,016	18,618	987	9,273	9,297	14,063	76,158	*25,002*	*14,895*
2nd quarter	7,359	2,415	13,131	18,678	924	9,039	8,760	13,091	73,395	*22,275*	*13,521*
3rd quarter	6,891	2,439	12,777	17,865	894	9,399	8,091	13,178	71,532	*24,303*	*14,451*
4th quarter	7,626	2,844	14,328	19,188	1,011	10,602	9,084	13,214	77,877	*25,515*	*15,129*
1976 1st quarter		2,856	15,138	20,043	1,032		8,862	13,222	78,286 (e)	*27,471*	*15,048*
1974 December	2,468	738	4,660	6,031	316	3,454	2,923	4,493	25,214	*9,365*	*5,289*
1975 January	2,479	828	4,752	6,096	338	3,113	3,125	5,011	25,739	*9,811*	*5,217*
February	2,499	835	4,678	6,327	359	2,980	3,107	4,738	25,522	*7,781*	*4,892*
March	2,502	784	4,585	6,195	288	3,179	3,064	4,305	24,897	*7,410*	*4,786*
April	2,493	816	4,415	6,573	318	2,981	2,886	4,428	24,904	*7,909*	*4,579*
May	2,414	809	4,244	5,882	310	2,823	2,886	4,290	23,658	*7,314*	*4,609*
June	2,453	790	4,472	6,222	295	3,234	2,988	4,377	24,836	*7,052*	*4,333*
July	2,267	803	4,294	5,847	302	3,142	2,676	4,520	23,848	*7,805*	*4,823*
August	2,185	805	4,173	5,843	286	2,814	2,544	4,447	23,097	*8,130*	*4,593*
September	2,440	830	4,309	6,174	305	3,443	2,870	4,212	24,587	*8,370*	*5,034*
October	2,456	874	4,644	6,320	308	3,288	2,766	4,397	25,049	*8,406*	*5,089*
November	2,605	978	4,897	6,307	357	3,637	3,203	4,367	26,349	*8,555*	*4,793*
December	2,565	991	4,786	6,562	345	3,676	3,116	4,439	26,478	*8,555*	*5,221*
1976 January	2,671	888	5,043	6,534	322	3,177	2,959	4,424	25,812	*9,425*	*5,126*
February	2,523	972	5,125	6,699	356	3,193	2,902	4,560	26,353 (e)	*8,820*	*5,037*
March		996	4,971	6,811	352	3,754 (e)	3,001	4,240	26,121 (e)	*9,226*	*4,884*
April			5,090 (e)	6,800 (e)		3,454 (e)		4,617		*9,200* (e)	
May								4,660			
% change in dollar terms latest three months											
On previous three months	3.4	0.5	3.1	4.7	2.0	−0.8	−2.4	0.7	0.5	*2.7*	*−0.4*
On a year earlier	4.2	16.7	11.0	6.4	4.6	13.8	−4.7	3.8	2.8	*17.9*	*1.0*
% change in national currencies latest three months											
On previous three months	3.2	−0.3	7.8	2.4	10.8	15.3	−1.4	0.8	4.8	*2.7*	*−1.5*
On a year earlier	17.5	30.0	25.1	16.2	32.1	54.0	7.7	31.1	26.7	*17.9*	*4.7*

[1] For most purposes special trade may be defined as trade excluding re-exports. [2] General trade. [3] fob. [4] Weighted average of percentage changes in national currencies
* All values are expressed in US dollars with the use of IMF parity rates as quoted in 'OECD Main Economic Indicators'.
(e) estimated.
Source: United Kingdom: Department of Trade. All others: 'OECD Series "A" '.

TABLE 5 Balance of Payments on current account

US$ million (unadjusted)

	Belgium/ Luxem-bourg	Den-mark	France	German F.R.	Ireland	Italy	Nether-lands	United Kingdom	EEC	*United States*	*Japan*
1970	724	−544	+297	729	−191	902	−518	1,661	2,470	*2,233*	*1,970*
1971	851	−423	530	323	−190	2,041	−233	2,588	5,143	*−1,247*	*5,821*
1972	1,113	−66	297	1,041	−139	2,266	1,050	221	4,314	*−5,462*	*6,624*
1973	1,140	−472	−691	4,343	−216	−2,510	−1,750	−5,718	865 (e)	*7,451*	*−133*
1974	911	−982	−5,943	9,693	−710 (e)	−7,817	1,648	−12,319		*2,568*	*−4,650*
1975	1,044	−508	330	3,828	−80 (e)		1,649	−7,111		*11,894*	*−680*
1973 1st quarter	366	−151	−225	565		−669	396	−890		*1,024*	*497*
2nd quarter	232	−179	280	1,039		−736	574	−471		*989*	*−416*
3rd quarter	217	69	−542	828		−14	−41	−603		*1,047*	*101*
4th quarter	326	−211	−206	1,917		−1,060	822	−1,165		*4,409*	*−315*
1974 1st qnarter	339	−519	−1,602	2,757		−2,503	335	−3,233		*2,533*	*−3,274*
2nd quarter	−121	−311	−1,864	2,193		−2,433	405	−3,233		*146*	*−2,377*
3rd quarter	323	−141	−1,930	860		−1,413	478	−2,970		*−2,179*	*−133*
4th quarter	370	−16	−547	3,883		−1,467	429	−2,879		*2,092*	*1,133*
1975 1st quarter	622	−88	−369	2,192		−461	129	−2,485		*3,086*	*−887*
2nd quarter	141	45	941	861		−9	437	−1,581		*3,957*	*−288*
3rd quarter	31	−72	−128	−407			385	−2,030		*742*	*−8*
4th quarter	251	−393	−114	1,182			698	−1,077		*4,134*	*502*
1976 1st quarter								−1,243			*192* (e)

Source: UK: Central Statistical Office. All others: IMF International Financial Statistics.

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TABLE 6 Export unit values of manufactures

Indices 1970 = 100

	Belgium/ Luxembourg		France		German F.R.		Italy		Netherlands		United Kingdom		*United States*	*Japan*	
	US$	Bfrs.	US$	frs.	US$	D.M.	US$	lire	US$	Gdrs.	US$	£	US$	US$	Yen
1970	100	100	100	100	100	100	100	100	100	100	100	100	*100*	*100*	*100*
1971	101	98	105	105	108	102	106	105	104	101	106	105	*102*	*104*	*101*
1972	112	99	115	105	117	102	114	106	117	104	116	111	*104*	*116*	*99*
1973	137	107	143	114	147	107	126	118	139	107	127	124	*113*	*141*	*107*
1974	171	133	162	140	172	122	154	160	178	132	153	155	*137*	*181*	*147*
1975			197	152	195	131					178	192	*159*	*178*	*147*
1973 1st quarter	122	102	126	110	124	103	119	110	124	105	119	118	*107*	*125*	*100*
2nd quarter	134	105	141	112	141	105	121	115	135	107	129	122	*111*	*136*	*100*
3rd quarter	148	108	153	115	162	106	131	120	148	124	131	127	*114*	*147*	*108*
4th quarter	147	113	152	121	157	109	133	125	152	112	132	133	*120*	*154*	*118*
1974 1st quarter	150	123	141	125	154	114	133	137	154	121	134	141	*127*	*165*	*134*
2nd quarter	173	132	158	139	175	120	148	151	179	130	153	153	*132*	*183*	*142*
3rd quarter	177	137	170	147	175	125	163	171	186	137	159	162	*142*	*185*	*152*
4th quarter	183	138	181	151	183	126	171	181	192	138	165	170	*148*	*190*	*159*
1975 1st quarter	199	139	196	152	203	130	184	188	209	139	178	179	*156*	*192*	*157*
2nd quarter	192	134	208	153	203	130	183	184	205	136	182	188	*159*	*188*	*152*
3rd quarter	176	138	193	151	189	132	179	190	185	134	175	197	*159*	*179*	*148*
4th quarter			193	154	185	131					174	205	*162*	*169*	*143*
1976 1st quarter													*165*		
% change latest 3 months:															
On previous 3 months	−8.3	3.0	Nil	2.0	−2.1	−0.8	−2.2	3.3	−9.8	−1.5	−0.6	4.0	*1.9*	*5.6*	*−3.4*
On a year earlier	−0.6	0.7	6.6	2.0	1.1	4.0	9.8	11.1	−0.5	−2.2	5.5	20.5	*5.8*	*−11.0*	*−10.0*

(e) estimated.

Source: Dollar value: 'United Nations Monthly Bulletin'. National currency: Dollar values converted at OECD exchange rates as quoted in 'Series A' : UK Department of Trade

TABLE 7 Consumer prices All goods and services

Indices 1970 = 100

	Belgium[1]	Luxembourg[1]	Denmark	France	German F.R.	Ireland	Italy	Netherlands	United Kingdom	*United States*	*Japan*
1970	100	100	100	100	100	100	100	100	100	*100*	*100*
1971	104	105	106	105	105	109	105	108	109	*104*	*106*
1972	110	110	113	112	111	118	111	116	117	*108*	*111*
1973	118	117	123	120	119	132	122	125	127	*114*	*125*
1974	133	128	142	136	127	154	146	137	148	*127*	*153*
1975	150	142	157	152	135	186	171	151	184	*139*	*171*
1974 1st quarter	125	123	134	129	125	144	134	132	139	*122*	*144*
2nd quarter	130	127	140	135	127	151	141	136	147	*125*	*151*
3rd quarter	136	129	144	139	128	157	150	138	151	*129*	*156*
4th quarter	140	133	149	143	130	165	160	143	158	*133*	*163*
1975 1st quarter	144	136	152	147	132	178	165	146	167	*135*	*165*
2nd quarter	148	140	156	151	135	189	169	150	183	*137*	*171*
3rd quarter	151	143	158	154	136	187	173	153	191	*140*	*173*
4th quarter	155	147	156	157	137	192	178	156	195	*142*	*177*
1974 December	141	134	150	144	130		162	144	159	*134*	*164*
1975 January	143	135	151	146	131		164	145	164	*134*	*164*
February	144	137	152	147	132	178	166	145	167	*135*	*165*
March	145	138	153	148	133		166	147	170	*136*	*168*
April	147	139	154	150	134		168	149	177	*136*	*171*
May	148	140	156	151	134	189	169	150	184	*137*	*173*
June	149	141	157	152	135		171	150	187	*138*	*172*
July	150	142	158	153	135		171	151	190	*140*	*173*
August	151	143	158	154	135	187	173	153	191	*140*	*172*
September	152	144	159	155	136		174	155	192	*141*	*176*
October	154	146	155	156	136		176	156	195	*142*	*179*
November	156	147	158	157	137	192	178	156	197	*142*	*177*
December	157	148	158	158	137		179	157	200	*143*	*177*
1976 January	158	151	159	160	138		181	158	202	*143*	*180*
February	159	151	160	161	139	206	185	159	205	*144*	*182*
March	160	152	167	162	140		189	161	206	*144*	*182*
April	161	154	167	164	141		193	164	210	*145*	*187*
May									212	*146(e)*	
% change last 3 months:											
On previous 3 months	1.9	2.5	4.0	2.5	1.9	7.3	5.4	2.8	3.5	*1.2*	*3.2*
On a year earlier	10.1	10.4	7.6	9.4	5.3	15.7	13.4	9.8	18.3	*6.4*	*9.3*

[1] Excluding rent.

(e) estimated.

Source: 'OECD Main Economic Indicators'

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TABLE 8 Value of retail sales Current prices, seasonally adjusted

Indices 1970 = 100

	Belgium/ Luxem-bourg	Denmark	France[2]	German F.R.[3]	Ireland[4]	Italy[4,7]	Nether-lands	Great Britain[5]	*United States*	*Japan*
1970	100	100	100	100	100	100	100	100	*100*	*100*
1971	108	108	104	111	111	111	108	109	*109*	*110*
1972	120	119	110	121	126	125	122	122	*119*	*118*
1973	138	134	117	130	148	152	136	139	*134*	*145*
1974	162	147	134	137	168	189	150	160	*143*	*165*
1975	183	167	147	149	199	208	169	191	*155*	*192*
1974 1st quarter	153	144	127	134	158	160	144	149	*138*	*157*
2nd quarter	159	148	131	135	165	166	149	154	*142*	*160*
3rd quarter	166	148	136	139	169	181	155	165	*148*	*170*
4th quarter	171	152	139	138	175	236	153	173	*142*	*173*
1975 1st quarter	176	161	141	146	183	181	164	181	*148*	*186*
2nd quarter	177	164	145	147	192	194	167	190	*153*	*192*
3rd quarter	184	166	147	151	200	192	170	194	*159*	*192*
4th quarter	192	180	154	154	216	264	177	199	*162*	*195*
1976 1st quarter		188	150					208	*168*	*200*
1974 August	157	148	133	139	172	162	155	165	*150*	*167*
September	164	147	140	143	171	196	154	168	*148*	*177*
October	172	151	146	143	175	225	155	170	*146*	*170*
November	162	153	136	139	177	196	153	175	*142*	*174*
December	175	151	136	133	173	288	152	174	*144*	*174*
1975 January	175	160	139	144	185	168	161	181	*147*	*182*
February	175	163	141	146	182	169	164	181	*150*	*186*
March	178	160	144	147	183	208	166	181	*147*	*191*
April	178	163	145	148	188	188	165	201	*150*	*191*
May	174	162	144	145	198	203	164	182	*154*	*192*
June	180	167	144	150	189	193	166	187	*155*	*193*
July	179	169	145	149	193	198	168	192	*159*	*193*
August	184	166	147	150	198	166	166	192	*160*	*194*
September	189	163	150	152	208	211	176	196	*158*	*190*
October	193	180	153	154	212	254	177	194	*160*	*197*
November	188	180	154	156	214	213	174	198	*161*	*194*
December	196	177	156	152	226	324	181	204	*165*	*195*
1976 January	195	181	151	155	222	201		211	*165*	*197*
February		208	148	158	236			207	*168*	*206*
March		174	151					206	*170*	*198*
April								214	*170*	
% change latest 3 months:										
On previous 3 months	2.3	4.8	−2.8	0.7	7.9	17.0	4.3	2.3	*3.5*	*2.6*
On a year earlier	13.1	16.6	6.1	9.9	26.7	13.2	15.7	11.4	*13.7*	*7.5*

[1] Department and chainstores. [2] Including chainstores. [3] Including indirect taxes. [4] Not seasonally adjusted. [5] Average weekly sales. [6] Excluding motor vehicles.

Source: 'OECD Main Economic Indicators'

TABLE 9 Earnings/wages per head in manufacturing

Indices 1970 = 100

	Belgium/ Luxem-bourg	Den-mark[1,2]	France	German F.R.[6] †	Ireland[2]	Italy[7]	Nether-lands[3]	Great Britain	*United States*[4]	*Japan*[5] †
1970	100	100	100	100	100	100	100	100	*100*	*100*
1971	111	115	110	111	116	112	112	111	*108*	*114*
1972	126	129	121	121	133	124	126	126	*113*	*132*
1973	147	153	138	136	159	154	143	143	*121*	*163*
1974	178	187	162	152	191	189	168	166	*131*	*206*
1975	210	224	185	165		239		209	*143*	*230*
1973 1st quarter	140	137	129	131	145	137	137	134	*118*	*148*
2nd quarter	144	151	133	134	157	151	140	139	*120*	*155*
3rd quarter	149	160	138	137	164	161	146	144	*122*	*162*
4th quarter	154	168	144	140	168	168	148	150	*124*	*174*
1974 1st quarter	162	173	147	144	172	176	158	147	*126*	*178*
2nd quarter	173	185	155	150	188	184	166	159	*129*	*204*
3rd quarter	184	190	164	156	196	194	174	172	*133*	*212*
4th quarter	192	202	169	158	207	202	175	185	*137*	*216*
1975 1st quarter	201	211	173	158	222	225	185	194	*139*	*225*
2nd quarter	207	223	177	161	241	238	189	202	*141*	*221*
3rd quarter	213	226	187	166	255	245	198	215	*144*	*237*
4th quarter	221	235	190	169		249		226	*147*	*237*
1976 1st quarter	227		195						*150*	*257*
% change latest 3 months:										
On previous 3 months	2.7	4.0	2.6	1.8	5.8	1.6	4.8	5.1	*2.0*	*8.4*
On a year earlier	12.9	16.3	12.7	7.0	30.1	23.3	13.8	22.2	*7.9*	*14.2*

† Seasonally adjusted.
[1] Including mining. [2] Earnings. [3] Hourly rates industry: males. [4] Gross hourly earnings per productive worker. [5] Monthly earnings in manufacturing: regular workers. [6] Wages and salaries per employed person in industry, excluding construction, public gas and electricity undertakings. [7] Hourly-rates times average daily hours worked.

Source: All countries 'OECD Main Economic Indicators', except German Federal Republic ('Monatsberichte der Deutschen Bundesbank', Reine 4), Italy ('I.L.O. Yearbook' and 'M.E.I.') and Great Britain ('Department of Employment Gazette' and M.E.I.).

Missions and Tours

Missions to explore Venezuela's fast expanding needs

From now until the end of the year the BOTB will assist over 200 firms to take part in 12 outward missions to Venezuela – the Latin American country now attracting most British missions because of its tremendous potential. In March 1977 the BOTB will be staging a major all-British exhibition in Caracas.

Many of the firms that are taking part in the scheduled missions have already established strong links in Venezuela. They are confident that they will further strengthen those links and make new contacts. For those UK manufacturers who have not yet established a foot-hold in this richest of all Latin American markets, the missions will help them to explore and assess the prospects for their goods or services.

Today, the potential of Venezuela as a market is recognised by a growing number of British manufacturers in every field. Currently British exporters are doing well in the sale of electrical equipment, tractors and other agricultural machinery.

With Venezuela planning for its future and the diversification of its economy, there are indications that some more important equipment contracts may come to the UK in the next few years. Particular attention is being turned to rail transport developments, the expansion and re-equipment of the steel industry and other heavy industries, and agriculture. At the same time openings will exist for joint ventures to set up new industrial enterprises, while existing opportunities for participation in local manufactures of consumer goods are likely to increase.

Birmingham chamber's first visit to Cuba

Continuing its pioneering endeavours for UK exporters in growing markets, Birmingham Chamber of Industry and Commerce is now planning its first-ever trade mission to the Republic of Cuba, which will take place in the early spring of next year.

Cuban foreign trade is, of course, a State monopoly and this means that rather than follow the normal speculative arrangements for a visit to an overseas market, careful consideration will be given to applicants who can fill Cuba's 'shopping basket'.

In recent times, Cuba has shown a serious desire to extend its trade links with the UK and, although imports are by no means liberalised, there are many products and processes exported by Midlands firms which will find a ready market – machinery, road making and construction machinery, pharmaceutical specialities, chemical products and most forms of capital equipment.

Between now and the departure date of the mission, the Chamber will be holding various discussions with the Cuban Ministry of Foreign Trade representatives based in London and the selected applicants for the mission will qualify for generous financial assistance under the BOTB outward mission scheme.

Further information from Arthur Jackson, Overseas Trade Secretary, Birmingham Chamber of Commerce and Industry, PO Box 360, 75 Harborne Road, Birmingham B15 3DH tel. 021-454 6171.

November mission to Thailand and Hong Kong

The London Chamber of Commerce and Industry is sponsoring a trade mission to Thailand and Hong Kong from 13-28 November. Arriving in Bangkok on 13 November, the mission will travel to Hong Kong on 20 November and return to London the following Saturday.

Further information from Diane Wright, Asia and Pacific Section, London Chamber of Commerce and Industry, 69 Cannon Street, London EC4N 5AB, tel. 01-248 4444.

Visit to the United States

Slough and District Chamber of Commerce and Industry in conjunction with the BOTB are sponsoring a mission to the west coast of the United States from 14-27 November.

For those participating who need new contacts, the full resources of the UK commercial service in the US will be available as usual and in addition the vice president of the Slough chamber, Peter Maclean, who has extensive contacts out there is prepared to assist to the full beforehand.

Applications should be made to John Peck, Slough and District Chamber of Commerce and Industry, 2 Bath Road, Slough, Berkshire SL1 35B, tel. Sough 33633.

Venezuelan financiers visit Britain

The Lord Mayor of London, Sir Lindsay Ring, receiving a group of Venezuelan financiers at Mansion House on 22 June. He is seen here (left) talking to (3rd from left) Dr. Carlos Rafael Silva, First Vice President, Banco Central of Venezuela, and (4th from left) Dr. Victor Hernandez, Manager of International Finance, Fondo de Inversiones de Venezuela.
During their stay in the UK, arranged by the British Overseas Trade Board and the Committee on Invisible Exports, the Venezuelan financiers visited the Stock Exchange, the Bank of England, the London Commodity Exchange and some of the City banking houses.

Wales. A great place for an expanding industrialist to spread himself a little.

Generous financial incentives.

Regional Development Grants of up to 22% for building and equipment

Taxation Allowances – free depreciation on machinery and 40% initial allowance on buildings

Selective Assistance – Loans and Removal Grants

Training Assistance

London in two hours. The world in a few more.

Wales is now one of the best-connected areas in the British Isles. A network of motorways and inter-city rail and air services puts you within easy reach of all major British business centres. Equally convenient are links with the rest of the world with international flights from Glamorgan (Rhoose) Airport, and passenger and freight services from the many large seaports in the Principality.

And it's a great place to live in, too.

Wales can boast some of Britain's most beautiful scenery, a highly varied cultural life, and excellent educational and recreational facilities.

Find out more.

Wales has a lot to offer the industrialist and businessman. Why not find out more about the opportunities available? Our Chief Executive, Meirion Lewis, will be delighted to give you all the facts. Get in touch with him at the following address:

Development Corporation for Wales, 15 Park Place, Cardiff, CF1 3DQ, Great Britain Tel: 0222 21208 Telex: 497190.

ENCIRCLE TI 101 ON PAGE 59 FOR FURTHER INFORMATION

CROESO I GYMRU

Trade and Industry special report

WELCOME TO WALES

John Morris, Secretary of State for Wales.

In the 2½ years since I was first appointed Secretary of State for Wales, one of my most pressing aims has been to give the Principality a sound economic base on which to build a prosperous future. Already a great deal has been achieved in this direction – in spite of the serious economic difficulties which have gripped us for too long – and I am confident that Wales is a land of opportunity in which both new and existing industry can thrive.

Every industrialist, of course, must take a long and searching look at an area before deciding to invest perhaps hundreds of thousands of pounds in locating a new project there. It is my firm conviction that Wales can offer tremendous benefits, not only commercially but also in the quality of life.

The Principality is successfully shaking itself free from its former excessive dependence on the coal and steel industries, and the scars associated with the early development of these industries are being healed perhaps faster than in any other part of Britain. They are being replaced by industrial, housing, and recreational sites which are once again becoming the very lifeblood of our community.

A number of important measures taken during the past year are of vital importance to the attraction of new industry to Wales. I am thinking firstly of the Welsh Development Agency, set up at the beginning of 1976, which has assumed responsibility for furthering economic development in Wales. The agency, which has an initial budget of £100 million, has taken over the functions of the Welsh Industrial Estates Corporation and is responsible for the work formerly carried out by the Derelict Land Unit of the Welsh Office.

Next there is the top priority which the Government is giving to the extension of the M4 westwards into industrial South Wales. At the present time, contracts worth about £100 million are being carried out or have been accepted for some 30 miles of motorway in South Wales. This improvement of the motorway route into the heart of industrial South Wales is vital to the future economy of the surrounding area. Once the M4 is complete there will be a major switch of resources to improving east-west road links in North Wales. Of course, it is not only the industrialised areas which have problems. Mid-Wales, with its traditionally small population and dependence on agriculture, has presented successive governments with headaches.

But now we have published a Bill which honours a government commitment to set up a Development Board for Rural Wales. The board will cover the areas of Powys, Meirionnydd and Ceredigion and will be responsible for encouraging economic and social development.

Lastly, I should mention that from 1 July last year I became responsible for the administration in Wales of selective financial assistance to industry under Section 7 of the Industry Act 1972, a function previously carried out by the Department of Industry.

Wales in the past has had more than its fair share of economic problems. But the Principality now finds itself with a new self-confidence. The measures outlined above; the prospect of a bigger say in decision-making through the Government's devolution proposals; and the possibility of oil and gas finds in the Celtic Sea all combine to provide a bright future.

Yet there is nothing narrow or exclusive about this new strength. And Wales welcomes those who wish to share in its hopeful future.

Croeso i Gymru!

We'll keep a welcome...

Four men voice their single objective: to welcome more industry to Wales. Meirion Lewis is Chief Executive of the Development Corporation for Wales, Ian Gray the Chief Executive of the Welsh Development Agency, Philip Hunt is Director of the Industry Department of the Welsh Office and Alan Sutton the Department's recently appointed Industrial Director.

We all know the traditional picture of Wales, don't we? Wales, the Land of Song – and the land of pits, of slate quarries, of slag heaps, tinplate works and hill farming. Well, in the last 40 years a new Wales has emerged. More than four times as many people now work in manufacturing industry as in the pits, slate quarries and hill farming combined. Industrialists have moved in, and have prospered: not only in South Wales, but in all parts of the Principality. If you decide to set up your plant in Wales today, you would not be pioneering. Hundreds have blazed the trail for you.

Why then are we, like Oliver Twist, asking for more? For two reasons – first, because we need more jobs. Jobs are still being lost in the restructuring of our traditional industries, and we want new jobs to offset them. And, second, we think we have something really good to offer.

The organisations we run are the three main central bodies directly concerned with encouraging further development throughout Wales. We have a common objective. We therefore decided that a joint introduction would best set the scene of the potential for manufacturing expansion which exists in Wales. You will read in the following pages what industrialists who have set up here have to say about their experiences. We need more firms – but we must make sure that new firms prosper as efficiently and as well as those which came to Wales some time ago. This is the way to ensure a strengthened economy not only in Wales, but in the UK as a whole.

We believe the conditions exist to bring about this soundly based, efficient industrial expansion. But what are they?

First, the quality of the workforce. We have asked management, and the TUC, who are directly concerned in this vital field, to speak for themselves in the following pages. You will learn from them about the quality of Welsh workers, and how they can acquire the most sophisticated skills needed in modern manufacturing. As we have said, there is still a need for new jobs, particularly for young people coming fresh from school. You will find them eager to face the challenge you can provide. There is an established and expanding network of training facilities throughout Wales to help them acquire the skills you need.

And you can get help in setting up your new project from public sources – the Government, the Welsh Development Agency, and Local Authorities. All Wales now has Assisted Area status. This means that the complete range of Government incentives is available to help you establish your plant. But we also have, in the WDA, a new statutory body responsible to the Secretary of State for Wales, with additional powers and additional money, designed to help you in your task. It is not necessary to catalogue in detail all the assistance you can have. One thing is certain: a very attractive incentive package can be tailor-made to suit any company establishing new plant anywhere in Wales. All you have to do is to phone or write to us.

Wales is within easy reach of London, the South East and the Midlands – the major industrial centres and markets of the country. The time it takes to reach these centres has been dramatically cut in the last few years, and the work is still going on. London is only two hours away along the M4. The M5 link brings the Midlands even closer. The M4 is now being extended right across industrial South Wales; and in North Wales planned improvements for the A55 coast road are next on the priority list. Rail services are excellent: by next year, when the High Speed Train comes into full operation, Wales will be only 90 minutes away from London. The ports around our coasts can take a wide variety of cargoes. Heathrow is under two hours by road from industrial Wales and Manchester less than that from North Wales.

What about specific locations for manufacturing projects? We know from experience that what will suit one firm will not do for another. Some small or medium-sized concerns want to break away from constricted, sub-standard, premises in an urban environment and look for a greenfield site. We can offer them what they want. You will not feel commercially isolated from the traditional manufacturing centres of Britain; and yet

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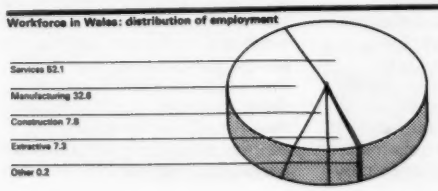
Parke, Davis's new 400,000 sq. ft pharmaceutical factory at Pontypool.

Estimated number of employees in employment in Wales: June 1974

Extractive	
Agriculture, forestry and fishing	27,200
Mining and quarrying	42,700
Manufacturing	
Food, drink and tobacco	19,400
Coal and petroleum products	5,800
Chemicals and allied industries	16,700
Metal manufacture	83,100
Mechanical engineering	27,200
Instrument engineering	4,600
Electrical engineering	35,300
Shipbuilding and marine engineering	1,600
Vehicles	26,400
Metal goods not elsewhere specified	23,200
Textiles	16,700
Leather, leather goods and fur	1,300
Clothing and footwear	16,400
Bricks, pottery, glass, cement, etc.	11,800
Timber, furniture, etc.	8,800
Paper, printing and publishing	12,800
Other manufacturing industries	24,700
Services	
Construction	67,000
Gas, electricity and water	19,300
Transport and communications	60,800
Distributive trades	100,000
Professional and scientific services	146,800
Miscellaneous services	91,500
Public administration and defence	75,500
Insurance, banking, finance and business services	25,300
Total: all industries and services	982,000

Workforce in Wales: distribution of employment



you can operate your factory against the backdrop of Snowdonia or the mountains of mid-Wales.

Other firms want to go to locations with a more concentrated labour market nearer to other manufacturers. Whether you want an individual site, to establish on a group site along with one or two other firms, or to take your place on a fully serviced industrial estate, you will find what you want here in Wales. And if you prefer a location in an expanding new town, there are two in Wales – Cwmbran in Gwent, and the aptly-named Newtown in mid-Wales.

The signs are that we are now drawing out of the recession, and the time for expansion is approaching. But during the recession, the Government, the WDA and the local authorities have not been standing still – we have been planning ahead against the upturn. We have increased the stock of available industrial sites, and a massive programme of advance factory building is now under way. When it is completed, we can say with confidence that whatever broad area attracts a firm there will be space available there for early or immediate occupation.

Another condition – perhaps the most important of all – is the quality of life. Wales as a holiday area is well known. But there is more to life than holidays. We believe that the vast majority of people who have come to work here in Wales are pleased that they have made the move. We can speak from experience. Leave aside Meirion Lewis and Alan Sutton – they are Welshmen and therefore biased! But Ian Gray is a Scot. He has worked and lived in various parts of Britain, as well as overseas. He had an earlier spell in Wales. It is not only the challenge of his new post with the WDA that has brought him back, he and his family welcome the chance to resume the way of life they enjoyed before. Philip Hunt is an Englishman. He too has spent several years abroad and came to his post in Wales from London only four years ago. He is due to retire shortly, and plans to settle down in South Wales. Here then are two very satisfied personal customers. Believe us, there are many more.

Sweet success

Haydn Williams, managing director of Smith Kendon Ltd., explains to Alan Williams why his company decided to move lock, stock and barrel from London to South Wales.

You moved your confectionery business from London down here to Bridgend three years ago, in 1973. But what was the original motivation?
Basically, we simply ran out of factory space and the difficulties of expanding in London tempted us to look elsewhere to cope with our growth.

Why did you choose South Wales?
We began to examine the type of additional capacity we would need sometime in 1971 and we looked at sites throughout the country. I suppose we looked, in all, at about 18 different possible locations, which we then whittled down to a short list of three. Then we did a complete costing on the three, taking into account all sorts of things – good port facilities, because 70 per cent of our output is exported; good road communications; housing for staff and availability of labour. And, obviously, we took very much into account the Regional Development Grants and all the other parts of the total package to attract industry to Wales. To be quite blunt about it, Wales came out marginally on top in total, so we decided to move here!

Were you looking for a ready-built Advance Factory, or did you want a site for a purpose-built unit?
No, this wasn't an Advance Factory – it was specially built by the Department of Industry to our design and specification. They showed us several possible sites in South Wales, and we chose this one at Bridgend.

With 70 per cent of your operation in the export field, some people might think that this location in Wales, being some way away from Heathrow and the traditional export outlets, is a distinct disadvantage.
On the contrary, it is a distinct advantage. Of our total export sales, over half go to Common Market countries and probably one of the best container services out of the UK is from Newport. This was, in fact, one of the factors we took into account when we decided to move here.

Would you go so far as to say that moving west has in fact brought you closer to your export outlets?
Our European outlets, yes. We stiil have the same problems with regard to Australia and the rest, but that would be a problem wherever we went because sometimes we ship out of London and sometimes Liverpool. Here we're equidistant from the two, so it makes no difference.

How about distribution within the UK? You make fairly extensive use of chain stores as outlets, and traditionally the Midlands rather than Wales is the place for central distribution.
Obviously, from that point of view, there would have been some advantage in being located right in the middle of England, although you can't have every company in the country located in the Midlands on that account! But we looked closely at the motorway network and the fact, for example, that the motorway will be coming to within a mile of the factory gates by next year is clearly an advantage.

I understand you did quite a lot of detail planning before you came down here. Was that, in retrospect, entirely necessary?
Absolutely vital. Not one minute of time spent on planning this move was wasted.

Do you think then that perhaps there should have been even more detailed planning?
On balance I think we probably got it about right. Of course, it doesn't follow that all our plans, all our judgements, were right, but I think the amount of planning we did was right. We could have gone on looking at various permutations indefinitely, but I don't think any of our planning was wasted.

Over what sort of period did you phase your move?
Over a period of about eight or nine months, gradually phasing out each production department in London as we phased it in here. It was a simple maxim that we didn't stop anything in London until we'd got the equivalent line moving here.

How many of your key staff did you bring down with you?
This perhaps is the one area where, if we were to do it all over again, we could benefit from the mistakes we made the first time. Whilst the move can now, with hindsight, be said to have been successful, there were one or two very naughty problems at the time! They mainly concern key staff who, when we first talked about the possibility of moving to South Wales, unfortunately immediately thought of coal mines and slag heaps. We couldn't convince them that by coming here they would be coming into one of the most beautiful parts of the country, so keeping key staff was definitely a problem. It wasn't helped, either, because we ran into trouble with the local authority over assistance with temporary housing for key staff and although, with a lot of help from the Welsh Office, we eventually managed to get things sorted out, unfortunately by that time much of the harm had been done because the key staff who we brought down to visit the area got a bad impression.

How many eventually came?
Eleven – not really enough.

So presumably you had a training problem from the outset?
Yes, but we managed to overcome it by persuading the key staff who did not want to move to come down here on a temporary basis for about three to six months. We put them up in hotels, and they stayed long enough to help train the new staff in their jobs. It was a problem and a challenge, but in the event we overcame it and as a result we now have what I think we can justifiably claim to be a really first class, locally engaged workforce. And there are many advantages in that!

Yours was a new industry to this area – did you have any problems with training?
No, not really. Indeed, if anything, over-zealousness was perhaps the thing we had to guard against! South Wales is traditionally a heavy industrial area and we are a light industry – there was a tendency to tackle the making of sweets rather like making steel, so we had to temper some of the over-enthusiasm!

Just how local are your 'locally engaged' staff? Do the majority of staff really come from, say, within walking or cycling distance?
No, the staff are much more mobile – some quite happily come as far as 25 miles.

That might come as a surprise to people who think of South Wales as an area, by tradition, with a reputation for immobility. Did they need much persuasion to come that far?
No, they commute daily, either by public transport or car – its not been any problem.

How does the availability and quality of labour in South Wales compare with say, London?
On availability, the initial recruitment of staff was very carefully planned. We set about the recruitment campaign about three months before we started operations down here and we were able to interview something like 650 for 150 jobs, so there was a delightful response. But if I say so myself, I think this was at least partly due to the way we did it. We made the jobs attractive, we offered career opportunities, and a definite policy of promotion from within. As for

quality, I don't think that from our experience the quality of labour in South Wales is any different to anywhere else in the country.

Despite the fact that, when you first moved down here, you were hit both by the three-day week and the sugar shortage, I understand you are now well up to your targets, so do you have any plans for further expansion?
It is always dangerous to be over-optimistic, but we now regard the move as well behind us and we are now concentrating on the development of our business. We are expanding and we have planned the growth, the size of the factory, the whole thing, on a marketing strategy taken to 1984. At the moment I would say we are perhaps two or three years ahead of where we expected to be at this time, so we are quite happy!

What would you say was the greatest single advantage of the move from London for the Company?
The opportunity to start from scratch all over again.

But doesn't that have some inherent disadvantages as well?
Oh sure. But when one is painting on a new canvas one hopefully takes out of the picture all those irritants that were there before!

Overall, then, would you say that you're happy with the move – that if necessary you would do it again?
I sincerely hope I'll never have to do it again – I don't think I could live through it! But to answer the question seriously, although we've been here only two years, in many ways it feels as if we've been here very much longer, because things are really ticking quite well. We took on another 50 people at the beginning of this year and went on to two-shift working. Sure we've still got problems – problems especially of longer-term management development – but these are all quite healthy signs of growth.

So you see the future of Smith Kendon very firmly planted in South Wales?
Yes, we moved here lock, stock and barrel. This is not a branch factory, its a total Head Office and factory. The future for Smith Kendon is here.

Contact points

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Tel : Cardiff 62131

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Third Floor
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Hill's Street
Cardiff CF1 2XG
Tel : Cardiff 44171

Small Firms Information Centre
16 St David's House
Wood Street
Cardiff CF1 1ER
Tel : Cardiff 396116

Training Services Agency
Dominions House
Queen Street
Cardiff CF1 4NS
Tel : Cardiff 394821

Welsh Development Agency
Treforest Industrial Estate
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Tel : Treforest 2666

Department of Employment
Wales Office
Dominions House
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Cardiff CF1 4NS
Tel : Cardiff 32961

Department of Industry
Regional Development Grants Office
24-26 Newport Road
Cardiff CF2 1SY
Tel : Cardiff 42611

Council for Small Industries in Rural Areas
Box No. 1
Ladywell House
Park St.
Newtown, Powys SY16 1EE
Tel : Newtown 27333

Wales Tourist Board
Welcome House
Llandaff
Cardiff CF5 1XS
Tel : Cardiff 567701

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Position_____
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TI 1

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Advance and become recognised

AB Electronics Components moved to an Advance Factory in a South Wales valley 26 years ago. Since then turnover has increased more than thirtyfold, and several more new factories have been opened in the area. Alan Williams talks to Henry Kroch OBE, managing director.

With your company now well established in Wales, do you think in retrospect that it was a good decision to come here, a good place in which to expand?
Yes, certainly. The company came here just over 25 years ago with about 200 people and it was then just a small family business. Now, we have factories in three locations in Wales, we are a public company and we employ over 2,500 people.

When you first came to Wales, you moved straight into an Advance Factory and you have since expanded into others. Is this an indication that you're basically happy with the concept of Advance Factories?
Yes, indeed. Coming to Wales was a major move and we took a 25,000 sq. ft Advance Factory. When, subsequently, an adjoining Advance Factory became vacant we took that over as well. About 15 years ago we purchased both buildings from the Department of Industry and four years ago another Advance Factory. We've also taken on two additional Advance Factories in the Rhondda Valley and we're renting those at the moment. Most certainly we feel that the Advance Factory concept is a great attraction for incoming industry.

Why did you choose to come to South Wales – since you manufacture fairly small, high value electronic components, one assumes that in theory you could have set up your operation in almost any Development Area with the same results?
In theory, yes, but in practice, for us at least, the Valleys have a particular attraction. You could, perhaps, liken it to the establishment of the watch making industry in the Jura mountains of Switzerland and France. The valleys around here are a particular attraction to an industry like ours which doesn't require much space, but which cannot thrive with a high turnover of labour. Here, because of the geography of the valleys and the nature of the people we can create very close personal relations and these are conducive to doing well the kind of work that we undertake.

So you would describe your work force as essentially local in origin?
Very much so, with regard to the general work force. There are, of course, some posts requiring special skills for which we have to import staff, because ours is still a comparatively new industry to Wales.

Has this need for certain specialists in fact caused problems?
It would be wrong to pretend that from time to time we have not had difficulties. We've had to attract people from all over the country, and when we first started we had to bring in tool makers from abroad in order to continue with our expansion programme.

I believe that over 60 per cent of your staff are women. When you first came here, did you envisage that you would be employing such a large proportion of female labour? After all, South Wales isn't a traditional area for female employment.
Well, of course, in 25 years conditions have changed considerably, but our industry traditionally is a major employer of females, because they take to our kind of work more readily than men.

To what extent was the choice of South Wales for your newer factories dictated by the location of the original here?
The new factories in the Rhondda Valley came about as a consequence of the original plan to bring in people from the Rhondda Valley to increase the labour force at our existing factories. Because of the geographical layout of the area and the complications for these people in getting here and back home again in reasonable time, we decided in the end that it made more sense, rather than bringing all these people here, for us to take the work near their homes.

And has that been successful?
Yes – so much so, in fact, that we now think that in retrospect, instead of growing as much as we have in this particular location – we now occupy a site of about 20 acres – it would perhaps have been better if we had opened smaller units in various valley locations.

In the 25 years since you moved to Wales, what has been the greatest single problem you've encountered?
I suppose the major problem for a company such as ours, which has expanded so much in only 25 years, has been the availability of special skills.

Have you been able to remedy this with a training scheme?
Yes, very much so – we have a fully approved training scheme, and we get exemption from the levy on these grounds. Even so, our training programme is not always capable of providing all the people that we require for further expansion.

The electronic component industry is vastly different from the traditional industries in the area. Has there been any reluctance to change ideas and attitudes, to adapt to the changing industrial scene?
No. Provided things are properly explained with a degree of consultation, there is no problem.

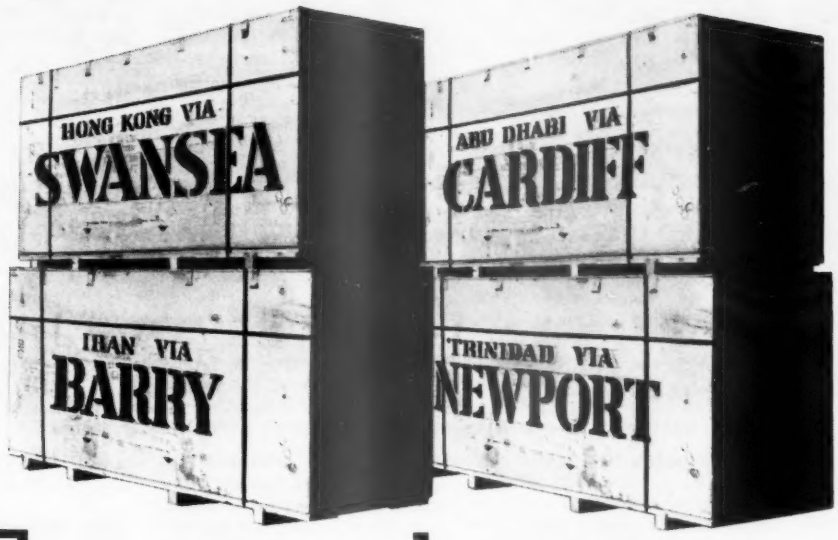
With a group of factories relatively close together, have you been able to take advantage of centralisation, to have, for example, common management services?
Yes, very much so. We have a central computer installation at our main factory at Abercynon to serve all our factories, we've got a Government-approved test house, a section building special-purpose machinery, a central personnel department, a central wages department and so on.

So you see the close-knit environment of the Valleys as an advantage?
Well, I think it's always an advantage being close together, in any environment, but the Valleys lend themselves particularly to it.

How about delivering the goods to the customer. You're in an industry which is essentially high value but low volume. Can you get your goods to your customers quickly and easily from these valley locations?
Now that the road system has improved so much this is not a problem, but of course when we first came we had certain difficulties.

Has this greater distance from your customers, compared with some of your competitors, proved to be a problem?
It has certainly presented some problems, but its also given us considerable advantages – here we suffer much less from high labour turnover from our competitors in the major industrial areas; by being remote we have managed to build up very much greater loyalties than we would have enjoyed in London or the Midlands.

You're fairly strong in the export field. Has your location here in Wales in any way affected your export efforts?
No, not at all, because, in addition to the International airport at Rhoose, with the improved road network London Airport is only two hours away. We export to virtually every part of the world, although over 80 per cent goes into the Common Market Countries, but we've certainly had no difficulties as a result of our location here in Wales.



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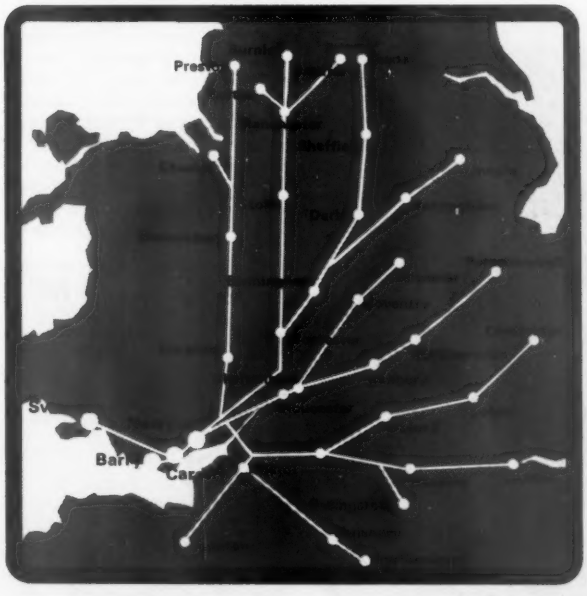

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Ready to go : a recently completed vacant Government factory on the Pennyfan estate at Oakdale.

George Wright, general secretary of the Wales TUC, is concerned about the image of the Welsh workforce. Here he explains to Alan Williams why he believes industrial relations in Wales are now better than ever.

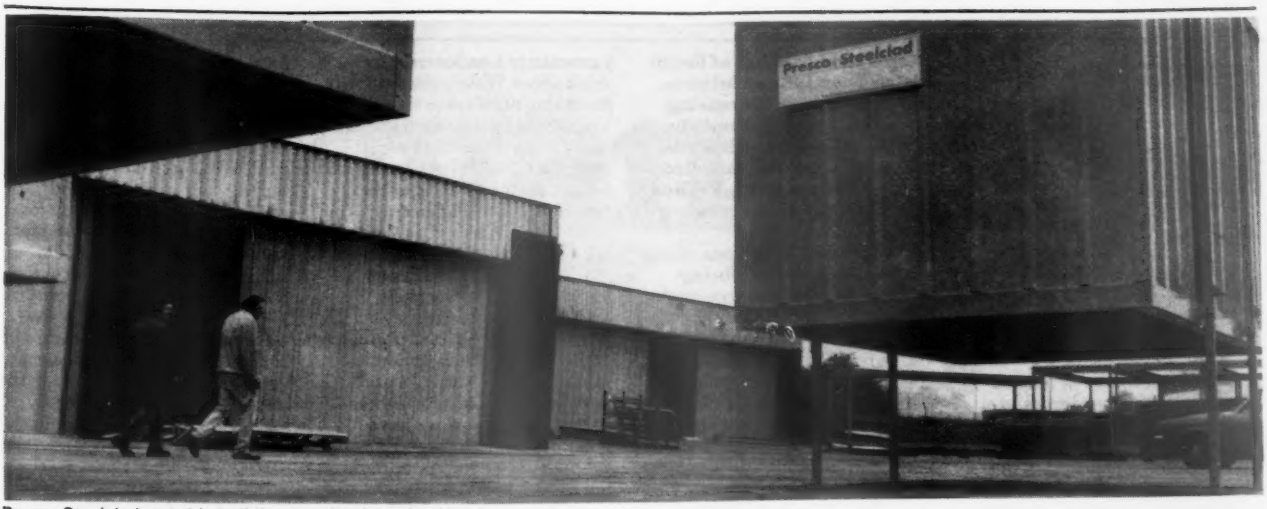
What about the workers?

Many people still think of the Welsh as an immobile labour force entrenched in the valleys, singing all day and working only four days a week. It clearly isn't true, but how far has this image affected industrial relations in Wales?
Unfortunately, many people still believe that music hall image, even though the Welsh workforce has shown over the last few years just how adjustable and flexible it can be. We've got miners becoming factory workers, and people in manufacturing industry becoming service workers. They're qualified, they develop skills very quickly and they have shown to all the firms who come to Wales just how adaptable and independent they are. It is certainly a fallacy that every factory in Wales is empty on Monday morning because people don't work on Mondays in Wales! If you were to ask the industries that have come to Wales, you would find that there is no real difference between the attendance record here than any other part of the country. And its certainly not true to say that industrial relations in Wales are bad, because our record over the last three years is excellent, particularly in those companies where there has been expansion.

So you would claim that it is better than average?
Certainly. In the newer industries that have come with Government encouragement to the advance factories you will find a great deal of enthusiasm on the part of the Welsh workers to make those companies succeed. And if I may say so, this has been very largely encouraged by the trade unions. If there is one thing about Wales that unites the people it is the wish to improve the industrial base and thus the country's economy. In Wales, there are no sharp and distinct differences between the CBI and the TUC, the trade unions or government departments – we are all pulling in one direction to improve the situation.

How about retraining for the new industries? Are people now willing to be more mobile, perhaps to travel longer distances to work?
Yes, that has been a very sharp lesson for the people in Wales in the last few years. We've had pit closures and difficulties in the steel industry, and these have underlined the need for many workpeople to travel further afield to a place of work which may perhaps be in the next valley. No longer is it possible to guarantee work just a short walk from your front door. But again, the Welsh worker is adjusting to the change, moving from one place to another, and the valleys – very many of them now – are increasingly becoming dormitory areas for Cardiff and places further afield. Ebbw Vale, for example, is an area where we are putting in a great deal of effort at the moment. The new factory

The British Steel Corporation's Margan steel works at Port Talbot.



Presco Steelclad portable buildings are fabricated at Newtown.

estates are well outside the town, yet the men who have been displaced from the steel works are more than willing to travel to the new factories and start on a new career.

The sort of industries you are hoping to attract – light engineering, chemicals and pharmaceuticals – are a far cry from the traditional industries in Wales. Are you happy that, with such a major shift in emphasis over a short period of time, the workforce will be able to adapt to so many new processes and practices?

Yes, I would think so. But, we in the unions have worried for a long time that we have been so totally dependent on one or two industries for major employment. When we have difficulties like those at Ebbw Vale, it quite literally affects half the community in the valley because it is so totally dependent on the steel industry. So we are more than eager to get a broader base, more diversification. The greater variety and number of industries we get, the stronger the local economy will be.

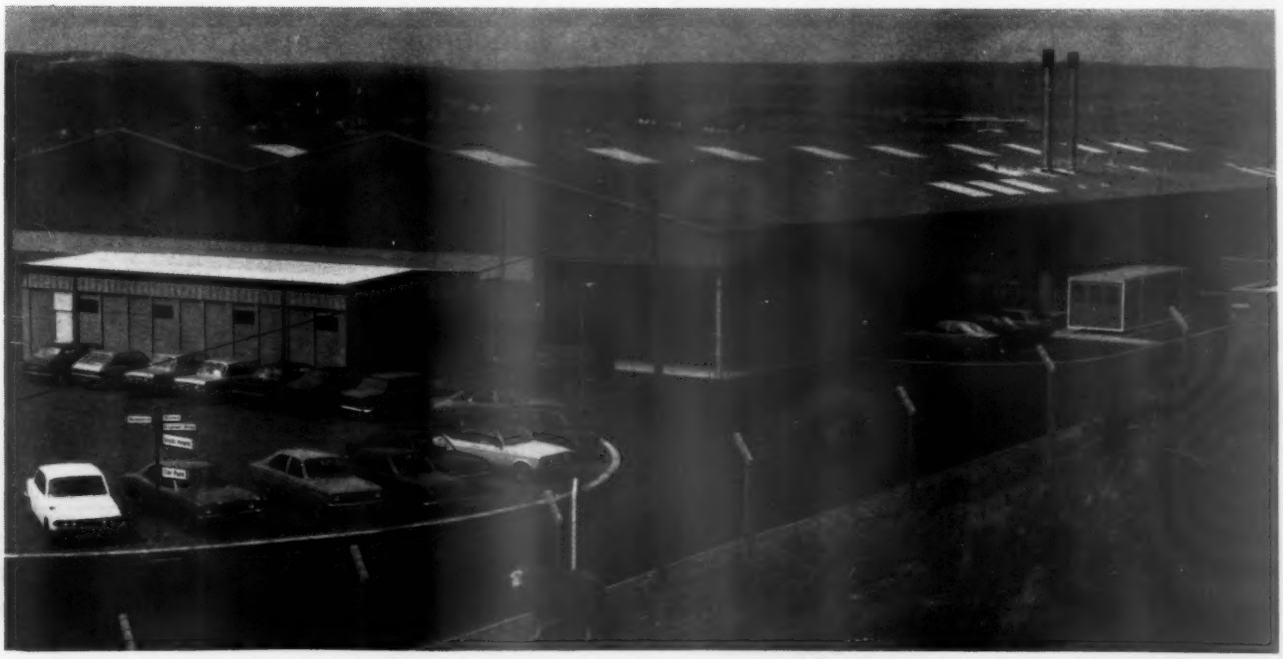
New industries tend to bring new techniques, and with them new problems. How can you help a company to set up a new plant and attract staff if you yourselves have no experience in that field?

We do of course have considerable general experience. One advantage that we have is, paradoxically, one of the difficulties of British industrial relations – what has happened before! The great advantage we have with a new company bringing perhaps a new type of industry is that we can make a fresh start, and thus avoid many of the difficulties that have grown up in the past. We can start off straight away on the presumption that people will be flexible – we haven't got to persuade them to change. The development of training places in Wales in the last two years has been rather better than in other areas in the country and there is a willingness and determination on the part of Welsh workers to broaden their own knowledge in industry. Another advantage that we have in Wales is that a large proportion of the labour displaced from the traditional industries is skilled. Moreover, the skills are easily adapted to the requirements of almost any type of company that we would be likely to attract.

Despite everybody's agreed intent to encourage the creation of additional jobs, recent employment legislation, coupled with spare production capacity and uncertainty about the future, tends to encourage the average employer to use his existing staff on overtime rather than to create new jobs. Just how much of a problem is this, in fact?

First of all we should be clear in our minds that the Employment Protection Act does no more than ensure for all what good employers have been doing for some time, and in Wales we have never had to work hard to achieve what the Employment Protection Act now demands. Its advantage is that it applies to everyone, so there is no longer the fear of a good company being unable to provide adequate facilities for its staff because of competition from somebody else who doesn't. As for discouraging the creation of new jobs, we feel that the first priority should be to get everybody to work, and we would argue that overtime should be controlled, the working week reduced and holidays increased in order to maintain work for the total labour force.

But of course that's not a rigid or a hard-line approach. We would far prefer companies to meet seasonal fluctuations by the use of overtime and then create a stable labour force rather than draw people in at one time of the year



What about the workers?

continued

and then put them out of work again later. We in trade unions tend to get a bad press and people say an awful lot of unkind things about us, but on matters of this character we are seeking to assist companies, not to tie them down, and we would want to be as flexible as possible in meeting conditions of that kind.

Which do you prefer to see – expansion of existing established industries creating new jobs, or entirely new companies bringing in new jobs – and with them new techniques, new skills and new risks?
We'd like to see both! And, indeed, we think that Wales needs both. As far as existing industries are concerned, I would hope that by expansion you also mean modernisation, because most of them are badly in need of it. But of course, modernisation can mean an actual reduction in the numbers of people employed, although it strengthens the base of the economy. As for attracting new industry, we certainly want the new techniques, diversification and the broader base it brings. We want to stop for once and for all this situation when almost the whole of Wales is affected every time there's a recession in one industry.

People tend to think of South Wales as an industrial area. But there are an increasing number of young people in Wales looking for office employment. Are you satisfied that you've got enough office jobs to offer these young people?
No, we are not. This is one of our weakest areas, and it is being made worse because large numbers of white collar jobs are being lost in the steel industry. We've persuaded central government to disperse some London offices to South Wales so as to absorb a proportion of these workers in the next few years. But there are still a great number of people looking for this type of job and there are certainly plenty of opportunities for those involved in that kind of activity to come to Wales and develop. Ideally, we would like to see some more office development in the towns just north of Cardiff, where they could most readily absorb labour from the three valleys. But, you know, we in Wales are very cautious about responding to that type of question! We've learned over the years that you can't just do what you want – you have to do what is practicable. The first priority must be to see that enough work is available, and only then to concentrate on getting people into the jobs that they particularly like. That must be the second priority.

Apart from central government, there's not much evidence of London-based offices, particularly the traditional City-based companies, contemplating Wales for decentralisation. Why do you think that is?
We know from the visitors we get that most people in England, particularly Londoners, rarely think about Wales, other than for fishing holidays or sightseeing. You would be surprised just how many still genuinely think of Wales as beautiful at one end and full of coal mines at the other. Few have examined in depth the potential in Wales. The Welsh are a scholarly nation and keen to involve themselves in new kinds of activity, especially the white collar jobs. After all, its a standing joke that Wales' greatest exports are its teachers! But we must be honest – at least part of the reason people have not come to Wales is because we have failed to promote the country properly. If we stop promoting it purely as a tourist attraction and point instead to the very real advantages for business and industry, I think they will come.

But are you satisfied then that you can offer them the same sort of communications, the same sort of office and home accommodation?
The pace of life tends to be a little different here – Wales is a pretty area, its a good environment and we're developing the communications. Whatever you want, you can choose a place to live in Wales which will give all the benefits you outline.

With this wholesale switching of parts of the workforce from one field to another, how can firms coming here from other parts of the country be sure that their labour costs are not going to be pushed up merely to meet rates enjoyed with previous organisations?
I don't know about basic rates but experience has shown that as far as actual earnings are concerned those who have come here have had no difficulty in maintaining rates which attract and keep a stable labour force. The really highly paid people from the traditional industries, like steel, are usually also highly skilled, very competent and capable people and it's rare for them to remain unemployed for very long. As for the medium range, what you might term the semi-skilled, it would be comparatively easy for any manufacturing company to measure up to the actual earnings levels that these people have achieved in the steel industry, so I don't really see any difficulties at all in that field.

Are you happy that firms coming to Wales for the first time came along to see you often enough and soon enough before they decide where in Wales, if at all, they will locate themselves?
No. Unfortunately, most firms seem to approach us only when they've already made the decision, and that's usually only because they have been advised to do so by a government department. It's still quite rare for companies to make direct approaches to us, which is a pity because I'm confident that we could put their minds at rest on many of the problems that they must think about and assist them in getting a good start in Wales. Assure them, if you like, of our positive attitude to development and industrial relations.

So you are quite happy to involve yourselves in the decision process?
We're more than happy! We're desperately willing to help because it matters so much that we encourage industry to come to Wales.

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The Post Office Data Processing Service has decided to set up a new headquarters for Computer Project Development work – moving from London to the centre of Cardiff from October 1976.

The Export Credits Guarantee Department national computer centre will re-locate from London to Cardiff in October 1976.

Zimmer Orthopaedic Limited have just opened a new 30,000 square ft. factory for hospital equipment at Waterton in the Vale of Glamorgan.

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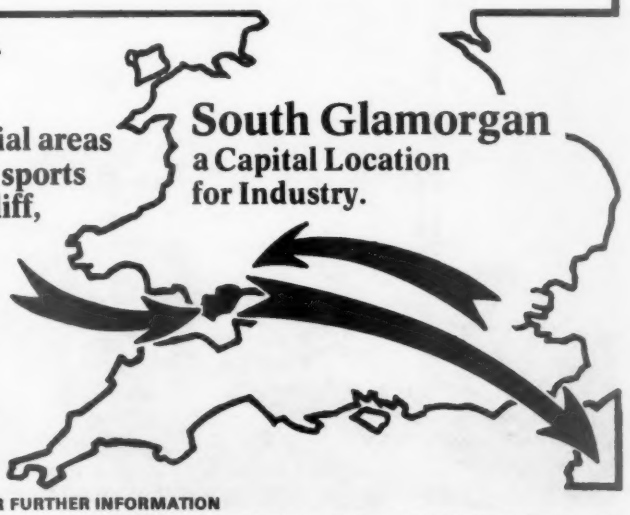

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Teamwork to the fore

Petron Golf Equipment Ltd. opened its doors for business less than three years ago. It was an entirely new venture, producing high quality golf clubs in a location quite remote from the traditional manufacturing or consumer areas. So why did Petron choose Newtown in Mid-Wales? Directors Peter Shanks (left) and Ron Goodchild explain.

We came to Newtown for both business and family reasons. Business-wise, we felt a small, new company like ours would come up against labour problems in an established industrial area. Large companies tend to suck in all the best available local labour by paying high bonuses. Ours is a very skilled industry – the manufacture of golf clubs takes a lot of training, a lot of knowledge – and it was just too much to ask in our embryonic situation that, after a two-year training period, we might lose our skilled men merely because of fluctuations in the local labour market. On the domestic front, one family came from London whereas the other came from Scotland. Given that we couldn't afford to set up shop anywhere in the South East, we looked at many of the new towns in the North East and Scotland but we came to the conclusion that central Wales was a better location for our families as well as our new company.

Initially our labour problems were very difficult. We had practically a 100 per cent labour turnover in the first year of operation, even though we brought some highly skilled people from Scotland to train the new staff we were employing locally. Since then, happily, things have improved considerably, and we now have only a 10 per cent turnover, essentially because there are now more and better people to choose from. In retrospect, we think the main reason for the very high initial turnover which surprised and worried us was that originally there were too few houses and too many new factories in Newtown. Thankfully, that situation has now balanced out and people have settled down more. One thing, we quickly discovered, is that there is no such thing as stealing a key employee from a competitor in Newtown, because there is none!

We looked at many locations in Scotland, the North East and the Midlands before deciding to come here. We were surprised, when we worked it out on the map, that we would be closer to all our major suppliers here than in any of the other possible locations, and clearly that was a considerable advantage. We can set off from Newtown at

Newtown New Town

07.00 in the morning and be on any of our suppliers' doorsteps by the time they start work! And its equally advantageous from the customer viewpoint – essentially we started the company on our own contracts, and these were mainly professional golfers based in the South of England. This location is as good as any for servicing the South of England, bearing in mind that if we'd tried to set up a factory in the South there would have been no financial incentives. We didn't have enough capital of our own so we had to have the financial inducements.

When we first started, we could drive to London relatively easily with a load of golf clubs and quite literally sell them from the back of the car. We could meet all our existing customers and be back here a couple of days later. If we'd been much further afield, say in Scotland, it would have involved flying or much longer road trips. To summarise, initially Newtown was a compromise location between where we would like to have been and where in fact we could afford to be. Of course, we should like to be in the South East because that's the greatest potential market for our equipment, but now, three years later, not being in the South East has proved to be very little disadvantage, even for our export business. We have a regular local carrier who visits Birmingham, London and South Wales weekly, and we can arrange a shipment with an international forwarding agent at 24 hours notice. For distribution within the UK, we use the Post Office, and frankly we have few transit problems.

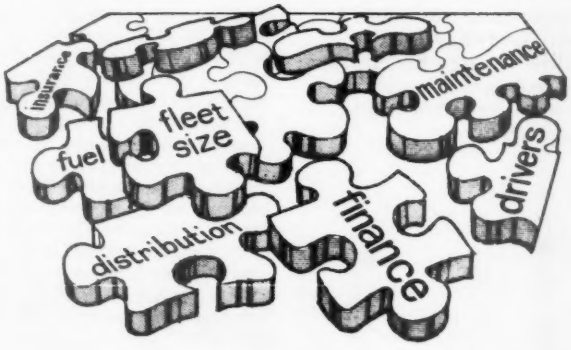
Another reason for favouring Newtown was the instant availability of suitable premises. When you are setting up a new company on a tight budget it is vitally important that you get into production as soon as possible. On those grounds alone we ruled out the North East, South Wales and North Wales. Here in Newtown they had exactly what we wanted, immediately available. But getting the right premises, of course, is only half the battle. It is just as important to recruit the right type of staff which, in our line, means people with the right type of physical co-ordination. Essentially, our people have to have an appreciation of good handcraft, and that is not altogether common in an area used to the rough and tumble of agriculture. We have, however, been able to train people and although its been a long process we now have a nucleus of very skilled, very competent people, most of whom are from the local area, so Petron is now a truly local industry! Due to the problems of training, we originally had difficulty with quality and throughput. Now, we're happy with the quality but we're still not quite content with the level of productivity as yet, although we're quite satisfied it will improve. Part of the problem has been rapid expansion – we started with just three people, and very quickly built up to the present total of 42, including both administrative and production staff.

Planning was our strong point – it had to be because, basically, we never had enough money! So unless we planned in advance in some detail, neither the bank nor the Department of Industry would have backed us. We were fairly sure that our idea was viable, but we needed the backing of a bank and the DoI, especially as we were also fairly sure our venture would not work if we were too small. So we needed to have a rapid build-up of people and the backing to go with it.

For the same reasons, we planned our timetable very carefully. We moved to Newtown eight months before we actually sent our first golf clubs out, and prior to that we planned the build-up in great detail for six months. We are certain it was only because we planned to such an extent and in such depth that when the going got rocky, with bad sales, bad production or people leaving, we were able to judge the situation fairly accurately. We had a three-year plan. From the moment we opened the door, we forecast what would happen, on a weekly basis, for the next three years. We planned everything – price increases, manufacturing increases, build up of staff, right down to the last part-time office girl and the cleaning lady. Now that we are fairly well established and have more expertise and controls built into our daily operations, we don't bother quite so much with the plan, but originally we kept strictly to our forecast. Our accountant was quite astounded how, in the beginning, our actual performance matched our various projections.

Looking back, teamwork has been the essence of our success. In the beginning it was our bank, then the DoI, the Mid-Wales Development Corporation and the local employment exchange, especially the manager. The list is almost endless; for example, the Council for Small Industries in Rural Areas provided an accountant at little cost to set up and administer all our original records. We shall always be thankful for so much help and guidance.

It's a right jigsaw!



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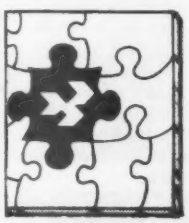

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Well engineered

Zachry Brierley is chairman of his engineering company, Z. Brierley Ltd. of Llandudno, a member of Wales CBI and chairman of the Small and Medium Firms Committee of UNICE, the European umbrella organisation for national confederation of employers' associations. Here he tells Alan Williams why he thinks more companies should consider expanding in North Wales.

You've been here in Llandudno for over 50 years. Are you entirely happy with the location?
Yes, the company was founded here in 1920 by my father and I was born here, so I cannot make a comparison with operating from anywhere else. I'm more than happy with our present location, and I can't think of a single reason why we should move. But I can think of many very good reasons why other firms should come here!

What would you say are the main attractions of North Wales for an industrialist such as yourself?
For me, the main attraction of North Wales is that it combines satisfactorily the personal desire for a good quality of life and the practical need for a sound industrial base. There are few places where you can have a factory within a mile or so of lakes and beautiful mountain scenery, and with a castle on the doorstep. Its quite an advantage to be able to go home after work without having to face commuter traffic – the roads are fairly free and there are plenty of places to live within easy access of both the country and the factory. In our 50 years of experience we have found no disadvantages of any consequence from operating a factory in this area. The roads are quite adequate and are being improved, so there are no problems in moving goods traffic. The resources that we need are within easy reach in Liverpool or Manchester, and we've got many facilities close by. We export our goods from here to all parts of the world without difficulty and we have the advantage that we have no problem whatsoever in persuading our overseas customers, distributors and agents to come to Llandudno to meet us!

Your company is very active in the export field, particularly Japan, and you have something of a reputation as a globe-trotter. But North Wales doesn't strike one as the ideal location from which to embark on international travel and a world-wide export drive.
Everybody thinks of North Wales as a backwater, but I can't think of a better place to export from than this part of North Wales. Liverpool and Birkenhead are very convenient and have the advantage that we can get to them without going through any city traffic, so we don't have the frustrating delays which some of our competitors in the Midlands suffer. And for business travel, Manchester Airport is within very easy reach.

Over the past few years you've considerably expanded your activities here in Llandudno. Do you see this as the centre for future expansion, or would you consider setting up another factory elsewhere?
I shall expand here – I can see no reason to do anything else. The only place in which I would expand in addition to North Wales would be overseas, just as one would expect a well-advised Japanese or German or Italian industrialist to come and set up an organisation in Wales, if he wanted to exploit the British market! But I would not set up another operation elsewhere in the United Kingdom.

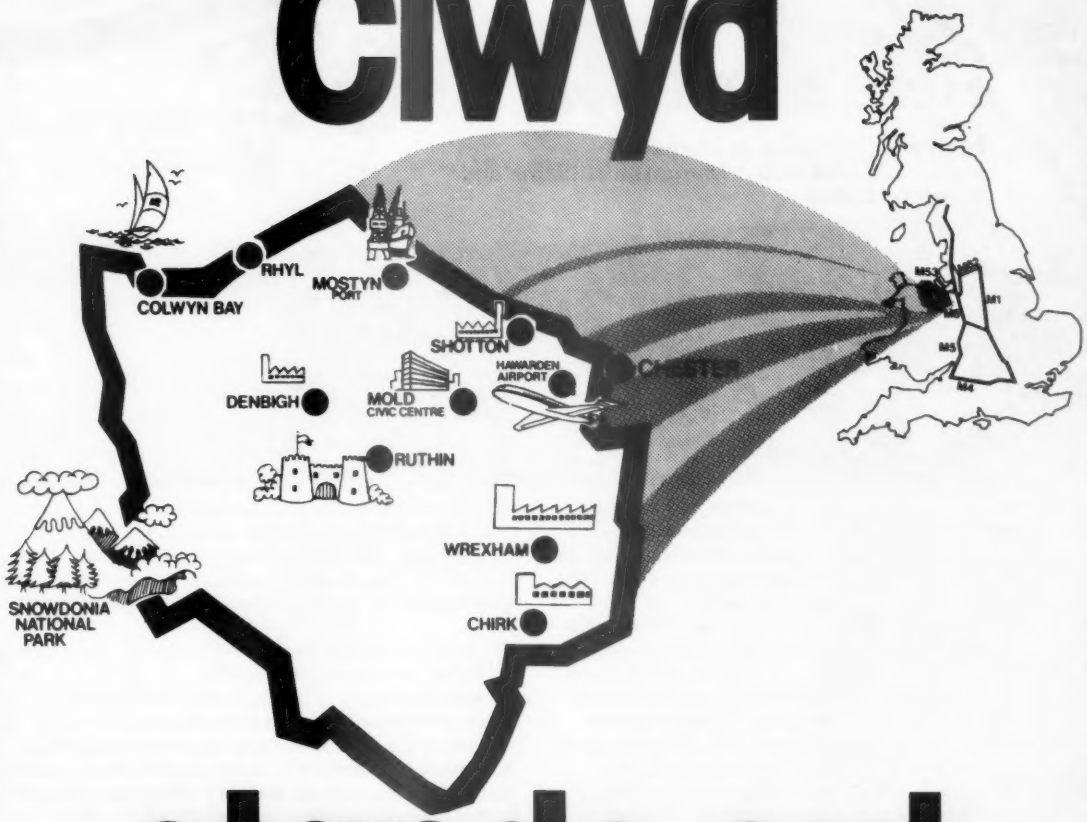
What about the apparent contradiction that much of North Wales is both a Development Area and a National Park. Just how likely is it that a new industry coming to the area will get a site it wants and the staff it needs?
That does confuse some people, but in fact there is no shortage of factory space or building land for factories. The very nature of the country is such that you can never be very far away from it, although we obviously wouldn't encourage a factory in the middle of the National Park! The perimeter of the National Park offers plenty of opportunity for new industry to build and expand. There is no shortage of labour and it's very intelligent and highly adaptable. But it's not generally associated with manufacturing industry, and therefore when industrialists consider Wales they tend to think in terms of industrial South Wales. It is certainly true that the bulk of industry is in the South, as is the majority of the population. Here in North Wales I like to think that although we haven't got quantity we can almost certainly offer quality. Every single firm around here is prospering and they are mostly international companies in the sense that either they have come here from overseas or, if born here, have prospered in markets not just within Wales or even the United Kingdom. Perhaps because the firms who come here tend to be outward-looking, they have been much more successful in the export field than their competitors in other parts of the country.

What is the view of Wales CBI on attracting new industry?
I should perhaps emphasise that, despite our own individual interests, we in the Wales CBI are primarily concerned to attract industry to Wales. One of the advantages of the country is that it can cater for almost any size of company in almost any type of industry. So, first, we have to convince them to come to Wales, and then help them choose the most appropriate place for their size and activity. One thing we really want to encourage is more office employment. We have this contradiction that although much of Wales is attractive in terms of quality of life, and office employers tend to be more sensitive about such conditions, Wales as a whole has been remarkably slow in attracting employment of this kind. In Llandudno, as in many other parts of Wales, just about every supporting service that a large office could need is readily available.

What is the main reason firms give for deciding not to come to Wales to expand?
I would say that in fact there are two common misconceptions. First, looking at the map purely geographically, Wales appears remote, whereas in fact it is not. South Wales is closer both in time and distance to London than some parts of the Midlands, and we in North Wales are literally on the doorstep of the industrial North West. Second, firms seem to think there will be no supporting services or facilities. Now, we have to be honest about this – if you happen to be in a highly technical field, or dependent on some very specialised services, then you may not find them immediately available in some parts of Wales. But then that is true of many other parts of the United Kingdom, so I think its a case of horses for courses!

Do you find that businessmen and industrialists in Wales, both in industry in general and in Wales CBI, are content with their chosen locations?
There's always a feeling that more could be done of course, and that's natural in a healthy industrial society. But I can truthfully say that I really do not know of a single firm – and I talk with them very frequently through the CBI – which is dissatisfied with its present situation in Wales or with the treatment it has received. They're all highly delighted and appreciative of the help and support that they were given or are getting. I always say that the best recommendation anybody can get to come to Wales is to speak to firms who have already established themselves here – I feel sure they will be encouraged.

Clwyd



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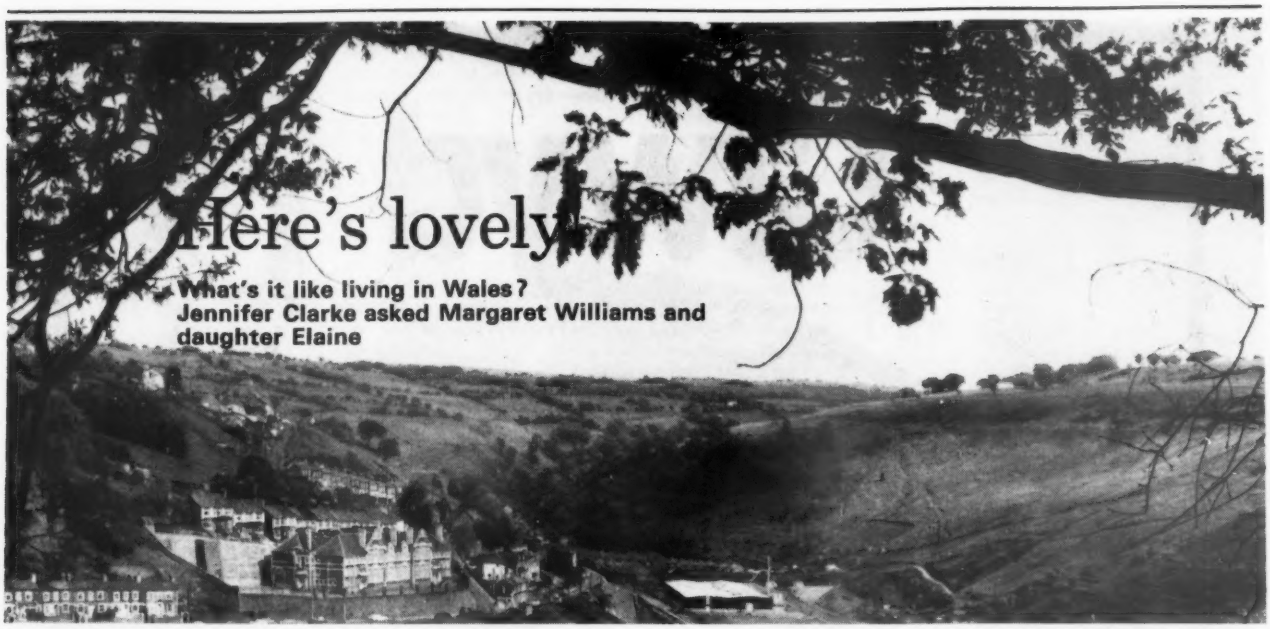

Here's lovely

What's it like living in Wales? Jennifer Clarke asked Margaret Williams and daughter Elaine

Margaret Williams is a Canadian, but if you ask her how long she's been in Cardiff she tends to say 'Longer than the British!' And with husband Harold, executive chairman of steel stockholders, founders and aluminium window manufacturers John Williams of Cardiff Ltd., she now has 26 years of residence to justify this claim.

Cardiff is, she considers, 'quite different from what people in the rest of Britain think'. And what is that? 'A coal mine,' she says pithily.

When she first heard where she was going, she had to look Wales up on the map. 'I knew it was part of the British Isles, but I wasn't sure just where it fitted in.' But surely she must have had some preconceived notions herself? Had she visualised coal tips? 'I'd never heard of a coal tip – we must mine coal differently in Canada!' she says, neatly dodging the accusation. 'But, I knew there were coal mines,' she admits, 'and I thought it would be bare, very bare – I never realised it was going to be green.'

People from England, she imagines, would have the same misconceptions. 'They've a preconceived idea that it's not going to be beautiful.'

'They also think we're uncivilised,' adds her daughter Elaine, 'and they think we live a different way of life.'

Faced with a transfer to Wales, she thinks, people sometimes fear they are about to leave civilisation, and find to their relief that Cardiff is a cosmopolitan city.

'When they come here and see the beauty of it and what culture is going on, and the fact that we have good restaurants and good shops, they're pleasantly surprised.'

It is true that they might occasionally miss out on London's multiple choice of theatres and exhibitions, but there is riding and golf, and in Penarth, where Margaret Williams lives, there are squash courts, recreation fields and cricket and hockey teams. Daughter Elaine likes watching rugby. 'You're speaking to a very pro-Wales one here!' she says.

Ten or 15 years ago, Margaret Williams might have gone to London to buy her clothes but now feels this is no longer necessary. Elaine has the same impression. 'There are the same clothes here as in London.'

Elaine went to the local grammar school and then on to college, first in Leeds and then in Swansea, to study civil engineering.

As Canadians, Margaret Williams considers that compared to the average British person she and her husband have perhaps a different attitude, but she considers that the education in Wales is excellent.

Why did Elaine choose to read civil engineering? 'I wanted to do something applied, that you could see: I didn't want to take a "pure" subject at university. I wanted to see the result of it.'

Now she finds that some of her friends who did 'pure' subjects have had to take further courses in order to get jobs. Most of them want to come back to Cardiff, she says.

Elaine herself works for a local partnership of consulting engineers. She remembers her time in Swansea as being happier than the year at Leeds. 'Looking back on the year at Leeds, the University itself was too big! Basically she found Wales a friendlier place.

Elaine was taught to speak Welsh at school up to 'O' level standard. When Margaret Williams is asked whether she is incensed by this item on the curriculum she always says No, she approves. It comes in useful. 'I remember following road signs in the early days, and I thought it was an anagram!'

The trend towards greater Welshness is not much of a problem, Elaine points out. 'People want to preserve the culture of Wales.'

Years ago, the road system in Wales may have been a disadvantage, but it is not so now. What about catching a plane? Margaret Williams points out that her friends in Birmingham have the same problem. 'And because we're on the M4 we can get to Heathrow before they can.'

She feels that in some ways, 'Wales has done a bad PR job. People should be aware that this area is no different from Gloucester, Oxford or Cambridge right through.' But the real attractions, she still feels, are the 'friendly people, and green, beautiful country'.

Trade and Industry

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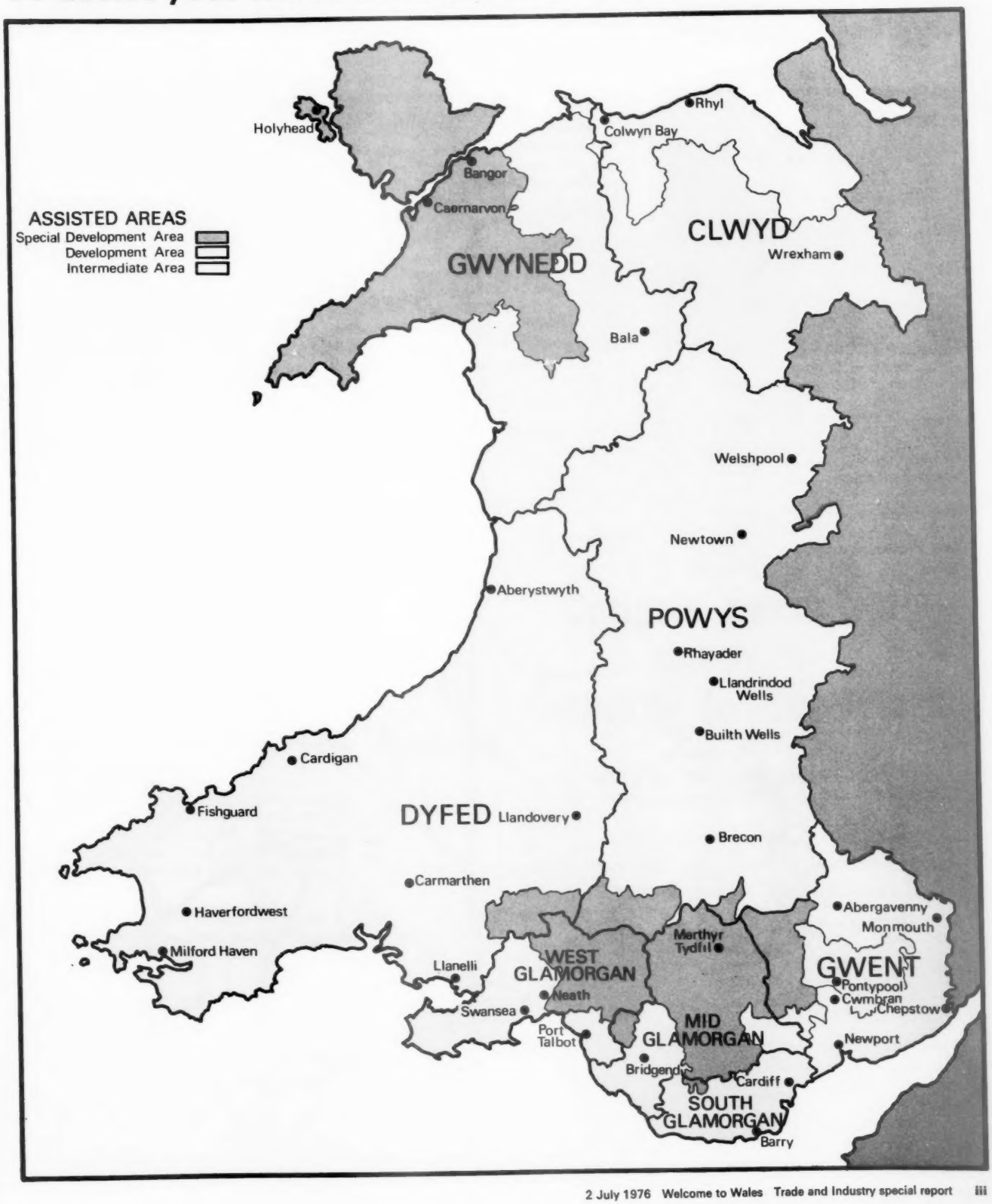

Wales: Communications

Motorway
Existing
Under construction
Proposed
Other major road
Passenger railway
Narrow gauge railway
Container terminal
Canal
Airport
Welsh Office industrial estate
New town
Mid Wales Growth Town
Principal port

Kilometres 0 10 20 30 40 50
Miles 0 10 20 30

Liverpool Bay
Caernarfon Bay
Cardigan Bay
Bristol Channel

M6 M57 M62 M53 M56 M4 M5

Holyhead
Llandudno
Colwyn Bay
Prestatyn
Rhyl
Birkinhead
Liverpool
Bangor
Caernarfon
Mold
Chester
Wrexham
Blaenau Ffestiniog
Criccieth
Pwllheli
Porthmadog
Bala
Llangollen
Harlech
Barmouth
Dolgellau
Shrewsbury
Welshpool
Tywyn
Machynlleth
Newtown
Aberystwyth
Llanidloes
Rhayader
Aberaeron
New Quay
Llandrindod Wells
Builth Wells
Cardigan
Lampeter
Fishguard
Hereford
Llandovery
St David's
Brecon
Carmarthen
Llandeilo
Haverfordwest
Abergavenny
Monmouth
Ammanford
Milford Haven
Merthyr Tydfil
Llanelli
Tenby
Neath
Swansea
Cwmbran
Pontypridd
Newport
Port Talbot
Porthcawl
Cardiff
Bristol
Barry

BOTB News

BOTB's practical help for British exporters

The BOTB will be giving practical help to British exporters by supporting over 1,620 British firms at 78 overseas trade fairs in 27 countries during the three months July to September. In addition, assistance is being given to 49 outward missions involving some 680 British firms going to 19 countries. In the same quarter, the board will support six retail store promotions and two British shopping weeks overseas.

Between January and September the BOTB expects to support 5,440 firms at 272 overseas trade fairs, compared with 5,239 firms at 258 fairs in the first nine months of 1975 – an increase of over 5 per cent in the number of fairs and nearly 4 per cent in the number of firms.

Outward missions supported by the Board have also increased in number. From January to September it is estimated that 2,400 firms, with BOTB backing, will have taken part in 181 missions involving 55 countries compared with 1,900 firms in 167 missions in the same period of 1975 – an increase of 26 per cent in the number of participating firms and over 8 per cent in the number of missions.

During the same period BOTB support is being given to the promotion of British consumer goods abroad at five shopping weeks (compared with four in the same period last year) and at 16 store promotions (34 in 1975).

Brian Picton of BOTB's trade fairs and promotions branch addressing a seminar on exporting which is one of a series currently being held by the British Jewellery and Giftware Federation. Seated next to him is John McConnell export marketing director of the Federation.

Have you a good export picture?

Each week *Trade and Industry* publishes pictures illustrating Britain's export business. Companies with export successes are invited to send in the story with a photograph showing the goods in manufacture, ready for despatch, or, preferably, on arrival overseas. The story must, of course, reach us while it is still news. Send your export photographs to the Editor, *Trade and Industry*, Room 439, 1 Victoria Street, London SW1H 0ET.

NB

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Exhibitions and Fairs

Second light industry exhibition in Moscow

From John Culver, Commercial Department, British Embassy, Moscow: Sixteen British manufacturers of carpet, textile and shoe machinery took part in a BOTB joint venture under the auspices of the British Textile Machinery Association at the International Equipment and Technological Processes in Light Industry Exhibition (Inlegmash '76) held in Moscow from 25 May-8 June. Inlegmash '76 was the second exhibition of its type held in the Soviet Union: the first was in 1970.

Considerable Soviet interest was generated by the excellent quality of the exhibits and by the overall effect of the British stands which occupied the whole of Pavilion 3 at the Sokolniki Park exhibition grounds. In addition to the customary high turnout of Soviet officials and specialists, an encouragingly large number of top-level Soviet ministers, including three Politbureau members, visited the British stands.

Light industry is a sector where UK firms have been traditionally strong in the Soviet market. The majority of the British companies taking part in Inlegmash are well known in Moscow: some of them have been trading with the Soviet Union for decades, and most have done considerable business in recent years. The three or four newcomers had interesting exhibits and are confident that prospects for future sales are good.

Britain's major competitors were very much in evidence, most of them with larger exhibition areas. The general consensus of opinion amongst Western companies, however, is that few contracts will have been signed during or directly following the exhibition. In part this can be explained by the present shortage of foreign currency available to potential Soviet purchasers. But in any case orders attributable to participation at Soviet exhibitions seldom arise until six or 12 months after the event. Equally, however, all agree that the long-term prospects for sales are good, particularly in view of the emphasis placed in the USSR's Tenth Five Year Plan (1976-80) on re-equipping light industrial enterprises in order to improve their productivity and the quality of the end-product.

John Rayson Phillips, joint managing director of Bentley Engineering Group, Export Ltd. (right), on his company's stand in Moscow with Sir Howard Smith, British Ambassador to the USSR.

Optimistic participants at Bergbau

From M. Crook, British Vice-Consul (Commercial), British Consulate-General, Düsseldorf: The organisers of the 9th World Mining Congress and International Mining Exhibition (Bergbau) in Düsseldorf (22-29 May) registered 101,500 visitors from 71 countries. 26 per cent of the visitors were from abroad. Visitors came from all countries including the COMECON bloc countries and the People's Republic of China.

The largest foreign participant at the exhibition was the UK with 57 manufacturers covering a total exhibition space of 3,340m² of which 2,890 were in the halls and 450m² on an open air site. Of the British exhibitors, 42 displayed their products on a BOTB joint venture stand under the sponsorship of the Association of British Mining Equipment Exporters (ABMEX) in hall 12. The other British firms exhibited independently.

The joint venture stand, covering about one-third of the floor space in hall 12 attracted many visitors. The calibre of the visitors was high and the exhibitors were able to renew old acquaintances and made new contacts. At an exhibition of this kind it is not expected that orders are taken during the event, but certainly the British contingent booked many serious inquiries which require follow-up action and by the end all were optimistic about their ability to compete successfully with the other industrialised nations on the worldwide market.

Exhibits ranged from hydraulic roof supports, shearer drums, chainless haulage systems, tunnelling machines, signalling instrumentation, computers, methane gas systems, shot stemming bags, weighing equipment, drilling equipment, pumps, conveyor belting, mining periodicals and last but not least expertise offered by the National Coal Board. Foreign visitors to the joint venture stand included representatives from the People's Republic of China, various South American countries, Poland, South Africa and the USSR. Keen interest in the British products was expressed by German coalmining engineers.

On Tuesday, 25 May, the British exhibitors were visited by Alex Eadie, Parliamentary Under-Secretary of State, Department of Energy and Sir Derek Ezra, Chairman of the National Coal Board.

British firms lead the way at Achema

From Stuart Young, British Overseas Trade Board, Frankfurt: ACHEMA – the triennial Chemical Engineering Congress and Exhibition – which took place in Frankfurt from 20-26 June, again saw a large contingent of British companies showing their latest developments in chemical engineering equipment and technology – developments which resulted in about £500,000 of firm orders being taken in the course of the week.

A total of 122 British companies took part – half of these through the BOTB's joint venture scheme – and many of them chose ACHEMA as the site for launching a number of products new to the fields of process plant and laboratory equipment, including the unveiling of APV International's plate-heat exchanger which is the largest of its type in the world.

The organisers – the German Society of Chemical Engineers (DECHEMA) – had made particular efforts to publicise this year's show, with the result that of the 2,278 exhibitors, 717 were from 26 foreign countries; the success of the organisers' efforts was also reflected in the visitor attendance which totalled over 150,000.

Although the site of ACHEMA is enormous – 16 exhibition halls, four open-air display areas, six lecture halls and a cinema – the overriding atmosphere is one of collective involvement. The ACHEMA congress 'city' has a population of over 150,000, and the professional environment is such that there is no room for the casual browser. Because the exhibition is part of the congress there are as many scientists and technicians as there are trade buyers.

About 300 lectures and plenary sessions were held and these covered every aspect of chemical process plant, laboratory equipment, measuring, control and automation instruments, structural materials, nuclear technology and, given a great deal of prominence in this year's programme, the problems of pollution control.

The BOTB supported joint ventures in conjunction with three trade associations – the Process Plant, British Laboratory Ware and the Scientific Instrument Manufacturers' Association – and all 61 of the UK firms reported widespread interest in their displays, with orders taken on the stand for some products, which is an uncommon occurrence for such a specialist event as this.

One of the most successful British firms was William Boulton Ltd. who were asked by a German buyer in the ceramics industry to provide 15 of their vibro-energy mills – an order worth £300,000. Also of note was the performance of Carbolite Co. Ltd. who are the sole manufacturers of a unique all-electric, resistant-heated 'variable-width' furnace for use in the coal and coke testing field; during the show they received an order from the 'Centre de Recherche Metallurgique' to supply their research laboratories in Liege – an initial contract exceeding £50,000. C. E. King and Sons had a very hectic first two days, receiving £35,000 in orders and the probability of £500,000 worth of business to follow, and Manesty Machines, who already export about 80 per cent of their total production, look set to improve upon this figure after their most successful ACHEMA ever.

All in all, the British companies more than just made their presence felt in Frankfurt last week, and perhaps the final word should rest with the Swiss agent of Quadrant Glass Ltd., who told the company's director, Michael Goebel, 'From conversations I have had – and overheard – this week, it seems that many of the German exhibitors are rather concerned about the superior quality and lower price of most of the displays of the British exhibitors'.

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Award for well designed and business-like stand

From Alfred Patron, Commercial Officer, British Consulate-General, Barcelona: The 44th International Trade Fair was held in Barcelona from 1-10 June and demonstrated the rapid progress which has been made in changing a general fair into a number of specialist sectors.

This event, the largest in Spain, covered a total area of 250,000m² and effectively displayed the products of some 3,300 exhibitors, of whom more than a third were from overseas. Five individual sectors offered machine tools and surface treatment equipment; mechanical handling equipment; security equipment; electrical, electronic, hydraulic and economic equipment; light fittings and furniture. The number of trade visitors was estimated at 125,000 and evidence of foreign interest was strong with the officially sponsored stands of 26 countries.

British official participation followed last year's pattern with a joint venture stand organised by the BOTB and sponsored by the Association of Hydraulic Equipment Manufacturers. Seven British manufacturers showed a specialised range of products which included pumps and motors, valves, cylinders, seals and instruments in a well designed, modern and business-like stand which gained for these features the award of a prize from the Municipality of Barcelona.

In addition to this officially organised stand, the products of 85 British manufacturers were shown by local agents. Items displayed covered a wide range including fork lift trucks, industrial belting, electronic components, porcelain and reproduction furniture. British interest in the increasing opportunities offered by the Spanish market was emphasised by a mission from the London Chamber of Commerce, representing a variety of commercial and industrial organisations, who visited the fair and also held useful joint discussions with the Barcelona Chamber of Commerce and Navigation and the Barcelona branch of the British Chamber of Commerce in Spain.

Although the fair got off to an initial slow start, the number of technical and professional visitors increased and participating British firms and their agents reported useful contacts and inquiries.

Letters to the Editor

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British stamp dealers and exhibitors prominent at Interphil

From E. Ruth Sachs, Commercial Department, British Consulate-General, Philadelphia: Interphil '76, the seventh International Philatelic Exhibition to be held in the United States, drew large crowds to Philadelphia's civic center between 29 May and 6 June. The exhibition, held under the auspices of the Fédération Internationale de Philatélie, takes place in the USA every 10 years. Coinciding as it did with the year of the Bicentenary, it was appropriate that Philadelphia, the focal point of the nation's celebrations, was the setting for this once-in-a-decade event.

Interphil was not merely a 'trade show', relevant only to the thousands of collectors and dealers who came from all over the United States and from many parts of the world, it was also of interest to large numbers of the general public, who were attracted by the rare and unusual opportunities the exhibition provided. Among the major attractions was a display of the 'aristocrats of philately', some of the greatest philatelic items in the world, such as a British Guiana 1 cent stamp valued at a million dollars.

Other attractions included slide shows, lectures, demonstrations of the art of stamp engraving and several hundred highly specialised competitive exhibits assembled by collectors from all over the world. On the commercial side, more than a hundred dealers and 35 national postal administrations did a brisk trade for the nine days of the exhibition, selling items from a few cents to many thousands of dollars.

Strong British presence

The British presence was strong at Interphil, second only to that of the USA. In the special exhibits section, pride of place was given to a selection from the Royal Philatelic Collection, displayed by special permission of Her Majesty. Also prominently displayed was the National Postal Museum's exhibit, which included such items of special interest to Americans as original die and sheet proofs, printed in London but never issued, of Confederate stamps, and designs for the Bicentennial commemorative stamp.

Thirty British firms held booths in the dealers' section, far outnumbering all other foreign participants. Almost all of them were part of a joint venture sponsored by the Philatelic Traders Society. Material offered for sale by the British dealers included specialised items such as collections of mid-East, German, and British colonial stamps, as well as broad and representative selections of British and international philately. Several companies had interesting examples of first-day covers and the commemorative covers of Concorde's first commercial flight, offered by a number of dealers, proved a popular item.

Almost all the British dealers felt the show was a commercial success. A number stated that the volume of business far exceeded expectations and that Interphil was, in fact, the most successful international show they had ever attended. Almost more important than immediate sales, according to many dealers, was the fact that valuable new contacts were made in the American market, giving the prospect of continuing sales in the future.

Also enjoying steady business throughout the nine days of the show were the Crown Agents Stamp Bureau and the British Post Office who held adjoining booths in the International Pavilion. Both reported record sales by the close of the exhibition. Wednesday, 2 June, the first day of issue in both Britain and at Interphil of the Bicentennial commemorative stamp, was the Post Office's busiest day. There was scarcely a moment during the entire nine hours of the show when long queues were not to be seen at the Post Office stands. The Post Office offered a variety of merchandise including current and former stamp issues, many of them in attractive presentation packs, but the Bicentennial stamp, not surprisingly, proved to be the single most popular item.

Among the many exciting events taking place in Philadelphia this year, Interphil '76 will certainly rank among the most outstanding. For nine days the city was the centre of international philately and for dealers, collectors and the public it was a rewarding and fascinating experience.

One of the British stands at Interphil where business far exceeded expectations.

Trade Information

Brazil: Among the top five for international investment

For the international investor or banker – particularly if he come from Europe – few countries can present conditions as favourable as those to be found in Brazil at the moment. The claim was made by Professor Joao Paulo dos Reis Velloso, Brazil's Minister for Planning, during a business seminar on Brazil held at the London Hilton Hotel on 21 June.

Minister Velloso went on, 'I can think of very sound reasons for putting Brazil among the five top countries for international investment, in the world, including both the industrialised and the developing nations.' He explained that the gross rate of investment in his country was 27 per cent of GDP last year and that Brazil had no difficulty in assimilating foreign investment because of the size of its economy and its 'stable and rational approach to foreign capital' which was 'within the context of an economic model based on private enterprise'.

Brazil, he said, had developed a striking ability to solve its own problems, in the social sphere and elsewhere, but there were straightforward economic opportunities in the areas of import substitution, the growing domestic market (GDP is running at over $100 thousand million per annum), and the development of exports. Despite the post-1973 recession, Brazilian exports had risen by 28.5 per cent in 1974 and 8.6 per cent in 1975.

Minister Velloso gave details of investment – public and private – designed to sustain the expected rate of growth during the next few years under Brazil's second national development plan (1975-1979):

	$ million
Energy	30,000
Capital goods and basic inputs	35,000
Shipbuilding	3,000
Railways	6,000
Roads	7,000
Communications	8,000

Michael Meacher addresses the seminar: 'Brazil's development programmes as a whole are impressive.'

Turning to the effect of the energy crisis on Brazil's economy, Minister Velloso said that, by the end of the seventies, Brazil was one of the countries that may expect to derive the greatest advantage from the new, emerging world economic pattern.

'Brazil possesses practically all the resources that are getting scarcer and scarcer in the world as we approach the eighties.' He referred to his country's 'almost unlimited capacity' to expand its agricultural production, mineral resources which could lead to self-sufficiency in all the basic industrial inputs – steel, non-ferrous metals, paper and pulp, petrochemicals and others – and Brazil's 'to say the least, reasonable' oil prospects.

On relations between the UK and Brazil, Minister Velloso spoke of the expanding links in the fields of trade, investment and financial co-operation. 'The total trade figures – exports plus imports – have grown from $276 million in 1970 to some $680 million last year.'

But, he pointed out, Brazilian exports to the UK still represented only 4 per cent of all Brazil's foreign sales and the UK had only a 3 per cent share of the Brazilian market. And investments, 'which have expanded at a reasonable rate', only amount to some 3 to 4 per cent of the flow of foreign investment in recent years. British financing, on the other hand, represented about 15 per cent of all external financing received.

'These figures show that, particularly in the area of trade and investment, there is still a widespread need and plentiful opportunities for expansion.'

Welcome from Michael Meacher

In a speech welcoming Minister Velloso Michael Meacher, Parliamentary Under-Secretary of State at the Department of Trade, referred to last October's Memorandum of Understanding between Britain and Brazil and to the highly successful state visit to Britain of President Geisel in May.

He explained that the visit had resulted in the signature of two Memoranda of Understanding agreeing the terms for British involvement in Brazil's steel and railway plans. On the steel side, British firms would lead European participation in the construction and financing of a new steel works in the state of Minas Gerais, while the railway agreement between British interests and the Brazilian federal rail network provided for the supply and finance of equipment and services for the Belo Horizonte-Volta Redonda steel railway. There had also been agreements covering finance for steel development and the transfer of British offshore oil technology.

These deals, he said, were impressive in their size and scope 'but Brazil's development programmes as a whole are impressive. And Britain is ready and able to help in the modernisation of industry and agriculture on which Brazil has embarked and to assist also in Brazil's economic development.'

For the greater part of the day, the 350 seminar delegates took part in discussion groups led by panels of Brazilian and British specialists. The subjects ranged from railways and mass transportation projects, joint ventures and investment in Brazil, to the development of mineral resources, and invisibles. Chaired by Lord Chalfont, the event was organised by the Economic Affairs Committee of Canning House, the BOTB area advisory group for Latin America.

Edmund Dell welcomes renewal of OECD Trade Pledge

Edmund Dell, Secretary of State for Trade, supported the renewal of the Trade Pledge for another year at the OECD ministerial council meeting in Paris on 22 June.

The pledge, which was first agreed by OECD ministers in May 1974, requires countries to avoid recourse to unilateral measures to restrict imports or measures to stimulate exports artificially.

During the council meeting Mr. Dell said, 'These have been two very difficult years. The OECD countries as a group have faced serious balance of payments and unemployment problems. One of the heartening features is that we have got through this period without undermining the basic rules of the international trading system or throwing into question the objective of expanding world trade. We have achieved this success because we have resisted the pressures on each of us to take protectionist measures. The OECD Trade Pledge has helped to strengthen this determination not to take protectionist measures. The pledge has played an invaluable role, not only for the countries represented here but for the developing countries whose economic position is inevitably related in large measure to our own.'

Mr. Dell pointed out, however, that it was important to remember that the pledge was a temporary measure designed to meet a short-term emergency situation and was not meant as a permanent addition to the standing rules in the Gatt and elsewhere relating to international trade. 'I am pleased to see that this is recognised, and it should be borne in mind when the situation is reviewed during the current year.'

He explained that when the UK accepted the renewal of the pledge last year, 'we did so subject to two qualifications. The first was that finance to cover the needs of the deficit countries must be available. This need still exists and, as a contribution to that end, we support the suggestion that the ratification of the OECD support fund should be completed as soon as possible.'

The UK also emphasised, Mr. Dell went on, the need for the economically stronger countries to play their part by following sufficiently expansionary domestic economic policies to alleviate the problems of the deficit countries. The UK had noted with satisfaction that the stronger economies had indeed led the way towards a recovery which now seemed to be gathering momentum and from which the OECD area as a whole could only benefit. 'We accept that the recovery must not get out of hand and must proceed at a sustainable pace. But it is equally important that expansion should continue and here too a particular responsibility lies with the stronger countries.

'On this basis I welcome the renewal of the trade pledge for another year.'

Import Duties Orders

The Treasury has made the following Import Duties Orders to operate from 1 July 1976:

The Import Duties (Temporary Reductions and Exemptions) (No. 12) Order 1976 which implements in the United Kingdom Tariff the suspensions of or reductions in the Common Customs Tariff on certain agricultural, chemical and industrial goods described in Schedules 1 and 2 thereto up to and including 30 June 1977 or up to and including such earlier dates as are specified. Schedule 3 of the Order provides for suspension of the intra-Community rate of duty on certain dried onions (up to and including 31 December 1976) and tinplate (up to and including 16 October 1976). The Order will be published as Statutory Instrument 1976 No. 1004.

The Import Duties (Temporary Reductions and Exemptions) (No. 13) Order 1976 which provides for exemption from or reduction in import duties in the case of certain chemical and industrial goods described in Schedule 1 up to and including 30 June 1977 or up to and including such earlier dates as are specified. In addition, exemption from or reduction in import duty is conferred on goods originating in Algeria which are shown in the Schedules to the various Import Duties (Temporary Reductions and Exemptions) Orders listed in Schedule 2. The Order will be published as Statutory Instrument 1976 No. 1005.

Revocation of anti-dumping duty on moving eyes for dolls from USA

The Department of Trade has made an order to revoke the anti-dumping duty on moving eyes for dolls imported from the USA, the revocation to be effective from 19 July 1976.

The anti-dumping duty is being discontinued because of the satisfactory operation of a price and monitoring undertaking given by the American supplier in June 1974. The price undertaking and monitoring are to continue.

Copies of the new Order, the Anti-Dumping Duty (Revocation) Order 1976 (Statutory Instrument 1976, 986), will be available from HMSO, 49 High Holborn, London WC1 (price 5p), or by post from HMSO, PO Box 569, London SE1 9NH (price 11½p).

Note

The Order removes the anti-dumping duty on certain moving eyes for dolls originating in the United States of America imposed by the Anti-Dumping Duty (No. 2) Order 1971. The duty has been suspended since 22 July 1974.

Quota for exports under licence of non-alloy ferrous scrap to countries outside EEC

The Department of Industry announce that the quota for exports under licence of non-alloy ferrous scrap to countries outside the European Community in the third quarter beginning 1 July 1976 will be 60,000 tonnes. Details of the arrangements for the issue of licences have already been announced.

Trade inquiries should be addressed to the Department of Trade, Export Licensing Branch, Sanctuary Buildings, Great Smith Street, London SW1P 3DB.

Note

The amount of the quota is unchanged from the previous quarter. The detailed arrangements for licensing exports were announced on 3 June 1976.

Singapore Paya Lebar Airport

Because of resurfacing work, the main runway at Paya Lebar Airport will be closed every day for two weeks from Monday 2 August between the hours of 11.30 p.m. and 6.00 a.m.

Aircraft scheduled to land between these hours and aircraft which have been delayed are liable to be diverted to Kuala Lumpur.

Tariff and Trade Notices

Iceland

Increase in special goods tax. The Icelandic authorities have announced that the special goods tax (which is levied on the cif value plus customs duty) has been increased from 10 per cent to 18 per cent for the period 4 May to 31 December 1976. The list of goods affected has been revised. Inquiries: 01-248 5757 ext. 458/461.

Italy

Economic measures. The Italian *Official Gazette*, 17 May 1976 published Law No. 249 of 10 May 1976 amending decree law 46 of 18 March 1976 (see *Trade and Industry* 14 May 1976).

Changes in manufacturing taxes and corresponding frontier surtaxes.
Methane Gas: The consumption tax and corresponding frontier surtax instituted on methane gas, pure or mixed with other gases for the propulsion of vehicles at the rate of L71.42 per cubic metre is reduced by 2 per cent.

Changes in Value Added Tax

a Goods now subject to 6 per cent VAT, previously 12 per cent
Food preparations containing cocoa, excluding chocolate, packaged in paper, cartons, plastic, tin foil or glass (part of BN 18.06)
Spa waters (part of BN 22.01)
Orthopaedic appliances, surgical belts, trusses and the like; splints and other fracture appliances; artificial limbs, eyes, teeth and other artificial parts of the body; hearing aids and other appliances which are worn or carried, or implanted in the body, to compensate for a defect or disability (BN 90.19)
Sporting and theatrical events, circuses, puppet and travelling shows.

b Goods now subject to 9 per cent VAT, previously 12 per cent.
Services rendered to guests in hotels and similar establishments, with the exception of those in 'luxury' classification, and on camping sites.

c Goods now subject to 12 per cent VAT, previously 6 per cent.
Wines of fresh grapes excluding liqueurs and spirits and those containing more than 21 per cent in volume of alcohol (part of BN 22.06).

d Goods eliminated from the 30 per cent VAT list.
'collections of stamps and stamps for collections excluding those of current or new issue in the country to which they are destined'.

This law came into force on 18 May 1976. Copies of the Italian law are available. Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Exchange deposit scheme. Notices in *Trade and Industry*, 14 May and 28 May 1976, set out specifications of the recent exchange deposit scheme. Additional exemptions from the scheme have been announced, details of which are as follows:

The purchase of bonds issued by the European Investment Bank and by the European Coal and Steel Community qualifying for total or partial investment in Italy.

The reimbursement and payment of interest relating to loans received from abroad.

The payment to non-residents of pensions and savings, other services deriving from social insurance and contributions in respect of alimony payable by law.

The transfer of wages to Italian agents abroad, but excluding representational expenses.

The allocation within established limits of 5 million lire a head to persons about to go abroad in addition to the tourist allowance.

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Exports (CRE) Divisions, 1 Victoria Street, London SW1H 0ET (tel: direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU (tel: 01-248 5757). In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension. In the Tariff and Trade Notices section countries are grouped by continents as far as possible; they are listed alphabetically on the contents page.

Payments into special authorised accounts established with foreign funds for the settlement of debts authorised by specific permits.

Distribution by means of payments into foreign accounts of loans granted pursuant to Law No. 131 of 28 February 1967.

Welfare contributions in favour of emigrants and payments by ICLE.

Payments through international postal vouchers and international postal giro within authorised limits.

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Payments for the importation of foreign daily newspapers.

Payments into foreign accounts of shipping companies and airlines of the proceeds from the sale of tickets.

Compensation paid by insurance companies in respect of third party liability of residents towards non-residents, transfers abroad following judgments which are beyond revocation.

Ships' stores.

Payments for the importation of artificial kidneys and spares as well as of haemo-derivatives and payments of up to 100,000 lire on any grounds are likewise excluded from the deposit.

Copies of the decree in Italian announcing those changes will be available shortly from OTAR Section, Export House. Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Malta

Minimum standards: hot rolled steel bars for the reinforcement of concrete. The Malta *Government Gazette*, 15 June 1976 announced that the act setting the minimum quality standards for hot rolled steel bars for the reinforcement of concrete (*Trade and Industry*, 7 May 1976) came into force on 16 June 1976. Inquiries: OTAR 01-248 5757 ext. 471/472/473/462.

Greece

Imports of veal and calves. The Greek authorities have imposed a ban on imports of fresh veal (02.01 AII) and calves for slaughter (01.02 AII a) from 1 July 1976 until further notice. Inquiries: OTAR 01-248 5757 ext. 439.

Mozambique

Payment for imported goods. The Ministry of Industry and Commerce and the Ministry of Finance have announced that, with effect from 8 May 1976, the following will apply in relation to payment for goods imported into Mozambique:

1 The banks in Mozambique have been instructed to verify that goods have been shipped before considering any case for externalisation of funds;
2 Payment in advance for imported goods is prohibited, save in exceptional circumstances;
3 The permitted methods of payment are by letter of credit or cash on delivery; and
4 In cases where exceptions to (2) and (3) above are thought to be justified, application must be made in advance to the Bank of Mozambique for the necessary authority.

Inquiries: CRE 01-215 5794.

CRE Commercial Relations and Exports Divisions
Department of Trade
1 Victoria Street, London SW1H 0ET
Tel. Direct dialling (see end of each notice)

OTAR Overseas Tariffs and Regulations Section,
Export Data Branch
Export Services and Promotions Division
Department of Trade
Export House, 50 Ludgate Hill, London EC4M 7HU
Tel. 01-248 5757 (extension at end of each notice)

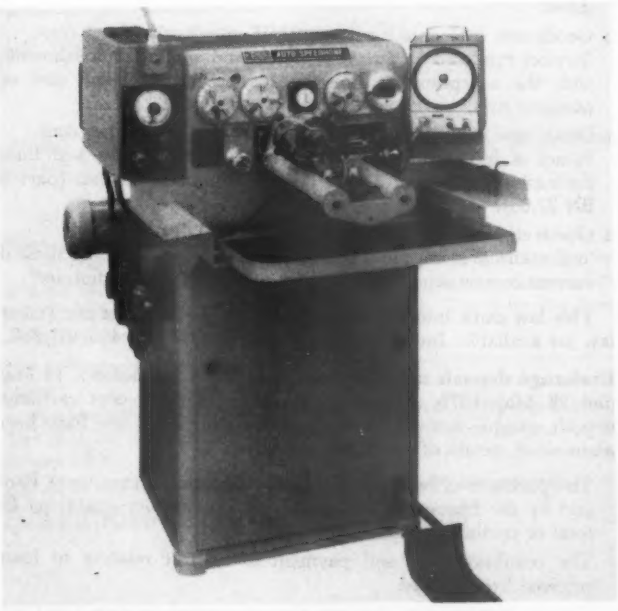
New Zealand

Customs tariff amendments. The New Zealand Government has issued Customs Tariff (Composite) Amendment Order (No. 4) 1976 which came into force on 4 June 1976, amending the following tariff items to read as below:

08.02.101	08.02.109	08.02.119	08.02.201	08.02.202	08.02.209	08.02.299
08.07.001	08.07.002	08.07.003	08.07.009	08.07.101	08.07.109	08.08.001
08.08.002	08.08.009	08.08.101	08.08.102	08.08.109	08.09.001	08.09.009
08.09.011	08.09.019	08.10.001	08.10.002	08.10.009	08.10.019	08.12.003
08.13.000	20.03.000	20.06.001	20.06.004	20.06.005	20.06.006	20.06.008
20.06.009	20.06.021	20.06.022	20.06.023	20.06.029	20.06.041	20.06.042
20.06.043	20.06.049	20.06.091	20.06.092	20.06.099	25.20.011	32.09.003
32.09.004	32.09.009	32.09.011	32.09.012	32.09.013	32.09.014	32.09.015
32.09.019	32.09.021	32.09.031	32.09.032	32.09.039	32.09.041	32.09.049
32.09.051	32.09.061	32.09.069	32.09.079	32.10.001	32.11.000	32.12.001
32.12.002	32.12.009	35.01.009	35.03.002	35.03.003	35.03.004	35.06.002
35.06.003	35.06.004	35.06.009	38.18.000	38.19.202	51.01.033	51.01.035
51.01.036	51.01.038	51.01.049	51.01.059	84.10.001	84.10.002	84.10.003
84.10.004	84.10.009	84.11.001	84.11.006	84.11.007	84.11.011	84.11.019
84.11.038						

Number	Description		Unit	Rates of duty effective on and after 1 July: Year	Normal tariff	British preferential	Other preferential rates of duty
CHAPTER 8							
Edible fruit and nuts; peel of melons or citrus fruit							
08.02	Citrus fruit, fresh or dried:						
	Whole, fresh:						
08.02.001	Oranges	per 100kg	kg	1975	45.2c	18c	Aul Free
		per 100kg		1976	45.2c	27c	Can Free
		per 100kg		1977	45.2c	45.2c	CPC Free
08.02.011	Tangerines, mandarines, clementines	per 100kg	kg	1975	45.2c	18c	Aul Free
		per 100kg		1976	45.2c	27c	Can Free
		per 100kg		1977	45.2c	45.2c	CPC Free
08.02.021	Lemons	per 100kg	kg	1974	91.5c	91.5c	
08.02.031	Grapefruit	per 100kg	kg	1974	91.5c	91.5c	
08.02.099	Other		kg	1974	Free	Free	

Honing machines for Romania



Five Auto Die Honer honing machines made by Delapena Honing Equipment Ltd., Cheltenham, will be delivered to Romania at the end of July with fixtures and accessories for machining heading dies – an order worth more than £30,000. This adaptation of the Auto-Speedhone machine is designed for close tolerance automatic and semi-automatic honing of components carrying out both roughing and finishing operations on a mass-production basis.

Number	Description	Unit	Rates of duty effective on and after 1 July: Year	Normal tariff	British preferential	Other preferential rates of duty
08.02.199	Other kinds	kg	1975	5%	5%	Aul Free Can Free
08.07	Stone fruit, fresh:					
08.07.201	Apricots, nectarines	kg	1975	5%	5%	Aul Free
08.07.299	Other	kg	1975	Free	Free	
08.08	Berries, fresh:					
08.08.201	Strawberries	kg	1975	Free	Free	Aul Free
08.08.299	Other	kg	1975	Free	Free	
08.09	Other fruit, fresh:					
08.09.101	Passionfruit	kg	1975	Free	Free	
08.09.199	Other	kg	1975	Free	Free	
08.10.000	Fruit (whether or not cooked), preserved by freezing, not containing added sugar	kg	1975	20%	20%	Aul 10% Can 10%
08.12	Fruit, dried, other than that falling within heading No. 08.01, 08.02, 08.03, 08.04, or 08.05:					
08.12.003	Apples	kg	1975	5%	5%	Aul Free Can Free
08.13	Peel of melons and citrus fruit, fresh, frozen, dried, or provisionally preserved in brine, in sulphur water or in other preservative solutions:					
08.13.001	Lemon peel	kg	1975	25%	25%	
08.13.009	Other	kg	1975	Free	Free	
	CHAPTER 20					
	Preparations of vegetables, fruit or other parts of plants					
20.03.000	Fruit preserved by freezing, containing added sugar	kg	1975	10%	10%	Aul Free Can Free CPC Free
20.06	Fruit otherwise prepared or preserved, whether or not containing added sugar or spirit:					
20.06.101	Ginger in syrup	kg	1975	10%	10%	Aul Free Can Free CPC Free
20.06.109	Other stems and parts of plants, except fruit, preserved in syrup	kg	1975	5%	5%	Aul Free Can Free CPC Free
	Nuts, roasted:					
20.06.111	Ground-nuts (peanuts); mixtures of nuts consisting principally of ground-nuts	kg	1975	10%	10%	Aul Free
20.06.121	Cashews; mixtures of nuts consisting principally of cashews	kg	1975	10%	10%	Aul Free
20.06.131	Other	kg	1975	Free	Free	
20.06.139	Cashews, not roasted	kg	1976	20%	20%	Aul 10% Can 10% CPC 10%
20.06.141	‡Apricots	kg	1975	35%	35%	Aul 25% Can 25% CPC 25%
20.06.142	‡Fruit salad	kg	1975	25%	25%	Aul 15% Can 15% CPC 15%
20.06.143	‡Peaches	kg	1975	25%	25%	Aul 15% Can 15% CPC 15%
20.06.144	‡Pears	kg	1975	25%	25%	Aul 15% Can 15% CPC 15%
20.06.145	‡Pineapples	kg	1975	30%	30%	Aul 10% Can 10% Mal 10% CPC 10%
20.06.146	‡Apples	kg	1975	25%	25%	Aul 15% Can 15% CPC 15%
20.06.147	‡Berry fruit	kg	1975	25%	25%	Aul 15% Can 15% CPC 15%
20.06.148	‡Prunes	kg	1975	5%	5%	Aul Free Can Free CPC Free
20.06.149	‡Plums	kg	1975	25%	25%	Aul 15% Can 15% CPC 15%
20.06.159	‡Other kinds (specify kind)	kg	1975	5%	5%	Aul Free Can Free CPC Free

‡ Fruit preserved in juice or syrup containing more than 40% of proof spirit shall be charged $0.88 per litre on such juice or syrup, in addition to the appropriate duty on the total value of the goods.

CHAPTER 25

Salt; sulphur; earths and stone; plastering materials, lime and cement

Number	Description	Unit	Rates of duty effective on and after 1 July: Year	Normal tariff	British preferential	Other preferential rates of duty
25.20	Gypsum; anhydrite; calcined gypsum, and plasters with a basis of calcium sulphate, whether or not coloured, but not including plasters specially prepared for use in dentistry:					
	Other:					
25.20.011	Specially prepared for use as putty and woodfillers	kg	1975	10%	10%	Aul Free Can Free CPC Free
	CHAPTER 32					
	Tanning and dyeing extracts; tannins and their derivatives; dyes, colours, paints and varnishes; putty, fillers and stoppings; inks					
32.09	Varnishes and lacquers; distempers; prepared water pigments of the kind used for finishing leather; paints and enamels; pigments in linseed oil, white spirit, spirits of turpentine, varnish or other paint or enamel media; stamping foils; dyes or other colouring matter in forms or packings of a kind sold by retail:					
32.09.003	Varnishes and lacquers		1975	20%	20%	Aul 10% Can 10%
32.09.009	Prepared water pigments of a kind used for finishing leather	kg	1975	10%	20%	Aul 10% Can 10% CPC 10%
	Paints and enamels; distempers:					
32.09.011	Cement based	kg	1975	20%	20%	
	Water thinnable:					
32.09.022	Mixed ready for use	kg	1975	20%	20%	Aul 10% Can 10%
32.09.023	Other	kg	1975	30%	30%	Aul 20% Can 20%
32.09.026	Pearl essence	g	1974	Free	Free	
	Other kinds:					
32.09.028	Mixed ready for use	kg	1975	20%	20%	Aul 10% Can 10%
32.09.029	Other	kg	1975	30%	30%	Aul 20% Can 20%
	Pigments in linseed oil, white spirit, spirits of turpentine, varnish or other paint or enamel media:					
32.09.031	Lead paste	kg	1975 1976 1977	5% 5% 5%	2% 3% 5%	Aul Free Can Free DC Free CPC Free
32.09.032	Aluminium paste	kg	1974	Free	Free	Aul Free
	Other kinds:					
32.09.042	In packs exceeding 4 litres	kg	1975	5%	5%	Aul Free Can Free CPC Free
32.09.048	Other	kg	1975	20%	20%	Aul 10% Can 10%
32.09.051	Stamping foils		1974	Free	Free	Aul Free
	Dyes or other colouring matter in forms or packings of a kind sold by retail:					
32.09.061	Laundry blue per 100kg	kg	1975 1976 1977	$3.66 $3.66 $3.66	$2.55 $2.91 $3.66	Aul $1.83 per 100kg Can $1.83 per 100kg CPC $1.83 per 100kg
32.09.069	Other		1975 1976 1977	10% 10% 10%	4% 6% 10%	Aul Free Can Free CPC Free
32.09.079	Other solutions of a kind described in Note 4 to this Chapter		1975	5%	5%	Aul Free Can Free CPC Free
32.10	Artists', students' and signboard painters' colours, modifying tints, amusement colours and the like, in tablets, tubes, jars, bottles, pans or in similar forms or packings, including such colours in sets or outfits, with or without brushes, palettes or other accessories:					
32.10.001	Of a kind used by signboard painters (for example, signwriters, colours, poster and showcard colours)		1975	20%	20%	Aul Free Can 10%
32.11.000	Prepared driers	1	1975	10%	10%	Aul Free Can Free CPC Free

Number	Description	Unit	Rates of duty effective on and after 1 July: Year	Normal tariff	British preferential	Other preferential rates of duty
32.12	Glaziers' putty; grafting putty; painters' fillings; non-refractory surfacing preparations; stopping, sealing and similar mastics, including resin mastics and cements:					
32.12.001	Glaziers' putty; woodfillers	kg	1975	20%	20%	Aul 10% Can 10% CPC 10%
32.12.002	Plastic wood	kg	1975	20%	20%	Aul 10% Can 10% CPC 10%
32.12.009	Non-refractory surfacing preparations		1975	20%	20%	Aul 10% Can 10% CPC 10%
CHAPTER 35						
Albuminoidal substances; glues						
35.01	Casein, caseinates and other casein derivatives; casein glues:					
35.01.009	Casein glues	kg	1975	10%	10%	Aul Free Can Free CPC Free
35.03	Gelatin (including gelatin in rectangles, whether or not coloured or surface-worked) and gelatin derivatives; glues from bones, hides, nerves, tendons or from similar products, and fish glues; isinglass:					
	Gelatin (including gelatin in rectangles, whether or not coloured or surface-worked) and gelatin derivatives:					
35.03.002	Edible gelatin	kg	1975	20%	20%	Aul Free Can 10% CPC 10%
35.03.003	Other	kg	1975	20%	20%	Aul Free Can 10% CPC 10%
35.03.004	Glues derived from bones, hides, nerves, tendons or from similar products; fish glues	kg	1975	30%	30%	Aul 20% Can 20% CPC 20%
35.06	Prepared glues not elsewhere specified or included; products suitable for use as glues put up for sale by retail as glues in packages not exceeding a net weight of 1kg:					
	Other:					
	Products suitable for use as glues put up for sale by retail as glues in packages not exceeding a net weight of 1kg:					
35.06.002	Rubber or gutta percha solutions or cements	kg	1975	20%	20%	Aul 10% Can 10% CPC 10%
35.06.003	Synthetic resin glues and cements	kg	1975	20%	20%	Aul 10% Can 10% CPC 10%
35.06.004	Other kinds	kg	1975	20%	20%	Aul 10% Can 10% CPC 10%
35.06.009	Other kinds	kg	1975	20%	20%	Aul 10% Can 10% CPC 10%
CHAPTER 38						
Miscellaneous chemical products						
38.18.000	Composite solvents and thinners for varnishes and similar products	1	1975	20%	20%	Aul 10% Can 10%

CRE Commercial Relations and Exports Divisions
Department of Trade
1 Victoria Street, London SW1H 0ET
Tel. Direct dialling (see end of each notice)

OTAR Overseas Tariffs and Regulations Section
Export Data Branch
Export Services and Promotions Division
Department of Trade
Export House, 50 Ludgate Hill, London EC4M 7HU
Tel. 01-248 5757 (extension at end of each notice)

Number	Description	Unit	Rates of duty effective on and after 1 July: Year	Normal tariff	British preferential	Other preferential rates of duty
38.19	Chemical products and preparations of the chemical or allied industries (including those consisting of mixtures of natural products), not elsewhere specified or included; residual products of the chemical or allied industries, not elsewhere specified or included:					
38.19.202	Napthenates and sulphonapthenates, water insoluble		1975	10%	10%	Aul Free
CHAPTER 51						
Man-made fibres (continuous)						
51.01	Yarn of man-made fibres (continuous), not put up for retail sale:					
	Of synthetic fibres:					
	Other yarn and thread:					
	Other kinds:					
	Not containing sheep's or lamb's wool or fine animal hair:					
	Other:					
	Polyester:					
	Not bulked, stretch, or texturised:					
	Weighing not less than 30g but not more than 160g per 9,000m:					
51.01.061	As may be approved by the Minister and under such conditions as he may prescribe	kg	1975	Free*	Free*	

* Or such higher rate of duty as the Minister may in any case decide.

	Other:					
51.01.069	Weighing not less than 30g but not more than 60g per 9,000m	kg	1975	10%‡	10%‡	Aul Free Can Free DC 5%‡ CPC Free
51.01.071	Weighing more than 60g but not more than 110g per 9,000m	kg	1975	10%†	10%†	Aul Free† Can Free† DC 5%† CPC Free
51.01.072	Weighing more than 110g but not more than 130g per 9,000m	kg	1975	10%**	10%**	Aul Free Can Free DC 5%* CPC Free
51.01.073	Weighing more than 130g but not more than 160g per 9,000m	kg	1975	10%††	10%††	Aul Free Can Free DC 5%† CPC Free

‡ Plus a duty equal to the amount by which the cif value is less than $3.45 per kg.
† Plus a duty equal to the amount by which the cif value is less than $2.85 per kg.
** Plus a duty equal to the amount by which the cif value is less than $2.75 per kg.
†† Plus a duty equal to the amount by which the cif value is less than $2.50 per kg.

51.01.079	Other kinds	kg	1975	10%	10%	Aul Free Can Free DC 5% CPC Free
51.01.089	Other	kg	1975 1976 1977	10% 10% 10%	4% 6% 10%	Aul Free Can Free DC 5% CPC Free
51.01.099	Other kinds	kg	1975 1976 1977	10% 10% 10%	4% 6% 10%	Aul Free Can Free DC 5% CPC Free
CHAPTER 84						
Boilers, machinery and mechanical appliances; parts thereof						
84.10	Pumps (including motor pumps and turbo pumps) for liquids, whether or not fitted with measuring devices; liquid elevators of bucket, chain, screw, band and similar kinds:					
84.10.001	Petrol vending pumps	No.	1975	30%	30%	Aul 20% Can 20% CPC 20%
84.10.002	Parts		1975	30%	30%	Aul 20% Can 20% CPC 20%

Number	Description	Unit	Rates of duty effective on and after 1 July: Year	Normal tariff	British preferential	Other preferential rates of duty
84.10.003	Submersible pumps	No.	1975	5%	5%	Aul Free Can Free CPC Free
84.10.004	Parts		1975	5%	5%	Aul Free Can Free CPC Free
84.10.009	Other		1975	30%	30%	Aul 20% Can 20% CPC 20%
84.11	Air pumps, vacuum pumps and air or gas compressors (including motor and turbo pumps and compressors, and free-piston generators for gas turbines); fans, blowers and the like:					
	Vacuum pumps:					
84.11.031	Suited for use with milking machines		1975	38%	26%	Aul Free
			1976	37%	29%	Can 20%
			1977	35%	35%	CPC 20%
84.11.039	Other		1975	52%	31%	Aul 25%
			1976	48%	34%	Can 32½%
			1977	40%	40%	CPC 32½%
	Compressors:					
	Suited for use with refrigerating appliances or for refrigerating purposes:					
84.11.041	Or a kind designed to use ammonia gas as the refrigerant		1975	7½%	4½%	Aul Free
			1976	7½%	5½%	Can 2½%
			1977	7½%	7½%	DC 2½% CPC 2½%
84.11.049	Other		1975	52%	31%	Aul 15%
			1976	48%	34%	Can 32½%
			1977	40%	40%	CPC 32½%
	Compressor outfits:					
84.11.051	Vehicle drawn		1975	15%	15%	Aul 5% Can 7½% CPC 7½%
84.11.059	Other		1975	25%	25%	Aul 15% Can 17½% CPC 17½%
84.11.069	Other compressors		1975	52%	31%	Aul 25%
			1976	48%	34%	Can 32½%
			1977	40%	40%	CPC 32½%
	Fans and blowers:					
84.11.081	As may be approved by the Minister and under such conditions as he may prescribe		1975	Free*	Free*	
84.11.089	Other		1975	40%	40%	Aul 20% Can 20%
84.11.099	Other kinds		1975	5%	5%	Aul Free Can Free CPC Free

* Or such higher rate of duty as the Minister may in any case decide.

Aul = Australia. CPC = Commonwealth Preference Countries.
Can = Canada. DC = Developing Countries.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

United States

Distilled spirits: bottles per shipping case. The *Federal Register* dated 14 June 1976 published a rule proposing the number of bottles per shipping case to accommodate new metric standards of fill.

Written comments (in duplicate) to the Director, Bureau of Alcohol, Tobacco and Firearms, Washington DC 20226, by 14 July 1976.

Endangered and threatened wildlife and plants. The *Federal Register* dated 14 June 1976 published a list of additional plants and animals which are designated endangered species. Effective 14 July 1976.

International trade in endangered wildlife. The *Federal Register* dated 16 June 1976 published rules proposed by the Convention on International Trade in Endangered Species of Wild Fauna and Flora, governing the trade of wild plants and animals between countries who are parties to the Convention.

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Written comments (three copies) by 16 August 1976, to the Director, (FWS/LE), US Fish and Wildlife Service, PO Box 19183, Washington DC 20036.

Copies of these texts are available. Inquiries: OTAR 01-248 5757 ext. 456/457/7312.

Endangered species of plants. The *Federal Register* dated 7 June 1976 published proposed rules by the Fish and Wildlife Service which would prohibit in some cases the import of plants and seeds or allow a general permit, according to circumstances. Comments by 9 August 1976.

Pleasure boats and equipment. The *Federal Register* dated 10 June 1976 published an amendment by the Customs Service to the entry of foreign made pleasure boats and equipment. The amendment applies to the standards imposed by the US Coast Guard on pleasure boats brought into the US after 1 November 1972 and is effective from 12 July 1976.

Copies of the texts are available. Inquiries: OTAR 01-248 5757 ext. 456/457/7312.

Brazil

Duty reduction on low density polyethylene. Customs Policy Council Resolution No. 2,761, published in the *Diario Oficial* of 11 May 1976, reduced the import duty on low density polyethylene, of tariff heading 39.02.02.02, from 45 per cent to 25 per cent.

Inquiries: OTAR: 01-248 5757 ext. 476/474.

Colombia

Duty reductions. Decree No. 1064, published in Bogota on 3 June 1976, reduces the duties on a wide range of products. The affected tariff headings are as follows:

04.01	04.02	15.07	38.11	Chapter 44		45.03	45.04	46.02	46.03
50.02 to	50.10	52.01	52.02	63.01	63.02	64.01	64.02	64.03	64.04
64.05	64.06	65.01	65.02	65.03	65.04	65.05	65.06	65.07	66.01
66.02	66.03	67.01	67.02	67.03	67.04	67.05	68.04	68.07	68.09
68.10	68.11	68.15	68.16	69.01 to	69.09	69.14	83.07	84.02	84.03
84.07	84.08	84.10	84.11	84.13	84.14	84.15	84.17	84.18	84.19
84.21	84.22	84.24	84.30	84.32	84.61	84.63	86.06	86.08	90.03
90.04	90.08	90.09	90.11	90.14	90.16	90.17	90.18		

Inquiries: OTAR 01-248 5757 ext. 474/476.

Registered trade marks

The lists of tariff, customs and import regulation changes in overseas countries published in this section of *Trade and Industry* sometimes contain words which are registered trade marks in the United Kingdom. So far as is practicable, all lists of goods are checked before publication from this point of view. Items which fall into this category are preceded by the letters rtm. Readers should note that this prefix signifies that the words are registered as trade marks in the United Kingdom but that in the present context are assumed to refer generally to products of the descriptions stated in brackets. While every attempt will be made to ensure that the scrutiny is complete, the lists may contain other words which are registered as trade marks in the United Kingdom or in other countries but which it has not been possible to identify.

Statistics

The economy: selected indicators

Series expressed as index numbers and seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
			Total	of which: Manufacturing industry	of which: Distributive and service industries inc. shipping	Total	of which: Manufacturing industry	of which: Wholesalers	of which: Retailers	Current balance	Visible balance	Invisible balance
	at 1970 prices		at 1970 prices			at 1970 prices				at current prices		
Base of index	1970	1970	1970	1970	1970							
£m in base year		31,472	9,380	2,130	2,090							
Series in						£ million				£ million		
1970	100	100	100	100	100	425	325	68	−30	735	−25	760
1971	102	103	102	93	104	70	−148	52	−10	1,058	280	778
1972	104	109	104	82	117	−18	−175	48	−11	131	−702	833
1973	110	114	107	88	125	1064	396	102	334	−842	−2,332	1,490
1974	110	113	105	98	113	597	666	81	−68	−3,611	−5,264	1,653
1975	108	113	104	85	98	−652	−386	−111	6	−1,700	−3,200	1,500
1973 3rd qtr.	110	114	107	92	120	181	46	29	47	−256	−625	369
4th qtr	109	114	107	89	132	205	96	32	51	−373	−950	577
1974 1st qtr	108	112	108	97	112	−176	−31	18	−59	−849	−1,297	448
2nd qtr.	110	112	100	96	110	295	191	43	27	−959	−1,366	407
3rd qtr.	112	113	103	97	119	373	368	3	−14	−852	−1,253	401
4th qtr.	111	114	107	101	113	105	139	17	−22	−951	−1,348	397
1975 1st qtr.	110	115	106	93	101	−176	−4	−31	−57	−466	−850	384
2nd qtr.	107	112	102	86	100	−254	−112	−54	−52	−360	−681	321
3rd qtr.	107	111	107	82	101	−156	−204	−29	60	−571	−986	415
4th qtr.	108	112	101	80	92	−66	−66	4	55	−303	−683	380
1976 1st qtr.	110	113 p		81 p	89 p		−5 p	16 p	−17 p	−60	−470	410
% change last 2 qtrs. on prev. 2 qtrs.	+2.1	+0.8	−0.2	−3.8	−10.0							
on a year earlier	−1.0	−1.8	−1.2	−17.0	−16.1							

	Industrial production		Personal expenditure		Prices and costs (NOT seasonally adjusted)				Labour (UK)			Visible Trade	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices	% increase on a year earlier	Wholesale prices: all manufacturing industry: basic materials and fuel used	Wholesale prices: all manufacturing industry: manufactured products: home sales	Basic hourly wage rates of manual workers (all industries and services)	Unemployed excluding school leavers and adult students: mid-month count	Unemployed excluding school leavers and adult students: % of total employees	Unfilled vacancies for adults: mid-month count	Export	Import
	at 1970 prices		at 1971 prices	monthly averages									On a balance of payments basis	
													at 1970 prices	
Base of index	1970	1970	1971		Jan. 1974		1970	1970	July 1972				1970	1970
£m in base year			15,895											
Series in				thousands						thousands		thousands		
1971	100.4	99.6	100.0	108.5	153.4†	9.4	104.6	109.0	88.9	775.8	3.4	130.9	106.7	104.2
1972	102.7	102.4	105.8	138.6	164.3†	7.1	109.2	114.8	101.4	855.0	3.7	147.3	106.6	116.3
1973	110.2	110.8	110.7	137.1	179.4†	9.2	144.5	123.2	115.6	611.0	2.6	307.0	121.8	133.9
1974	106.3	108.1	109.9	102.8	108.5	16.0	215.3	152.0	138.7	599.5ø	2.6ø	302.2ø	130.1	135.2
1975	101.0	101.4	107.9	97.2	134.8	24.2	235.4	188.7	179.8	929.0	4.0	148.2ø	124.9	125.6
1974 2nd qtr.	107.8	109.6	107.8	105	107.5	15.8	213.7	148.9	132.3	577.4	2.5	318.4	134.0	137.5
3rd qtr.	108.1	110.0	111.2	107	110.2	17.0	212.9	156.1	144.0	613.7	2.6	308.7	133.4	136.4
4th qtr.	105.0	105.9	111.3	97	115.1	18.2	222.1	164.9	153.5	..	..	..	126.5	133.0
1975 1st qtr.	104.6	106.1	111.3	108	122.0	20.3	220.9	176.0	163.6	737.9	3.2	..	128.9	125.4
2nd qtr.	99.8	100.0	108.9	94	133.6	24.3	225.6	186.3	176.3	847.4	3.6	164.4	122.6	122.2
3rd qtr.	99.3	99.5	105.5	103	139.4	26.6	239.3	193.4	185.5	1,000.0	4.3	133.6	120.0	127.4
4th qtr.	100.5	100.1	105.8	84	144.2	25.3	256.0	199.1	193.8	1,132.1	4.9	113.6	128.3	127.2
1976 1st qtr.	101.2	101.4	107.3	106	149.4	22.5	266.1	206.9	205.5	1,223.2	5.2	115.5	132.1	123.8
2nd qtr.										1,246.7p	5.4	119.6 p		
1975 May	99.1	99.1	103.7	95	134.5	25.0	226.2	187.3	176.4	850.3	3.6	163.3	133.0	119.9
June	99.1	99.4	104.1	91	137.1	26 1	227.7	189.0	182.6	893.5	3.8	149.0	120.2	122.7
July	99.8	100.2	105.4	91	138.5	26.3	233.2	191.7	184.8	968.2	4.1	133.9	123.0	134.3
Aug.	98.1	98.3	104.8	98	139.3	26.9	241.4	193.5	185.6	997.4	4.3	135.9	115.2	124.9
Sept.	99.8	100.0	106.1	120	140.5	26.6	243.2	194.9	186.0	1,034.4	4.4	131.1	121.9	123.1
Oct.	100.9	100.7	104.8	85	142.5	25.9	252.3	197.0	187.5	1,088.7	4.7	118.9	130.5	128.9
Nov.	100.9	100.7	105.2	81	144.2	25.2	256.7	198.9	195.6	1,133.0	4.9	111.8	123.4	128.0
Dec.	99.6	98.8	107.0	87	146.0	24.9	259.0	201.5	198.2	1,174.6	5.0	110.1	130.9	124.7
1976 Jan.	101.0	101.9	109.8	115	147.9	23.4	261.0	204.8	202.1	1,210.5	5.2	111.1	131.9	125.8
Feb.	101.6	101.3	107.1	101	149.8	22.9	263.5	207.3	206.4	1,232.4	5.3	113.5	128.4	125.4
Mar.	101.1	100.9	105.5	101	150.6	21.2	273.8	208.6	207.9	1,226.6	5.3	122.0	136.1	120.3
Apr.	102.1	102.3	108.5	118	153.5	18.9	285.1 p	211.4 p	209.3	1,233.7	5.3	123.9	136.5	131.1
May			105½ p	112	155.2	15.4	290.7 p	214.6 p	210.6	1,250.0	5.4	120.6	138.4 p	137.1 p
June										1,256.5p	5.4	114.3 p		
% change latest 3 months on prev. 3 months	+1.1	+1.0	−1.4	+9.2	+3.5		+8.4	+3.4	+3.5	+1.9		+3.5	+5	+3½
on a year earlier	−1.5	−2.4	−4.1	+15.3	+18.4		+26.6	+15.6	+21.8	+47.1		−27.2	+9	+7½

p Provisional pe Preliminary estimate † Base of index Jan. 1962 = 100 .. not available ø Average of 11 months

Symbols used in all statistical tables

.. not available	r revised
— nil or less than half the final digit shown	* five week period
p provisional	• fifty-three week period

Made-up clothing: orders and deliveries

In the three months ended February 1976, deliveries by the clothing industry were provisionally estimated to have been 4 per cent higher than in the preceding three months while net new orders were 3 per cent higher. Orders-on-hand at the end of February 1976 were 2 per cent lower than the end-November 1975 level. (These comparisons are based on the seasonally adjusted series in the accompanying table.)

In using the index numbers shown in the table, it should be borne in mind that, when price increases are large, the various problems associated with constructing a constant value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent months.

Made-up clothing

Index numbers of total orders and deliveries

	Orders-on-hand (end period)		Net new orders		Deliveries	
	December 1969 = 100		Average 1970 Deliveries = 100		Average 1970 Deliveries = 100	
	Actual	Seasonally adjusted	Actual	Seasonally adjusted	Actual	Seasonally adjusted
1968	107		100		97	
1969	100		97		97	
1970	103		102		100	
1971	119		108		104	
1972	125		110		109	
1973	155		123		117	
1974	145		115		114	
1975	143		119		116	
1974 1st quarter	164	161	111	115	107	108
2nd quarter	171	149	122	113	113	115
3rd quarter	137	143	96	113	115	117
4th quarter	145	145	129	118	122	118
1975 1st quarter	135	139	116	124	116	121
2nd quarter	164	149	131	118	113	111
3rd quarter	132	145	99	117	116	118
4th quarter	143	150	128	117	117	112
1974 April	171	163	133	122	115	114
May	182	155	134	109	108	113
June	171	149	100	107	117	118
July	156	149	85	113	112	116
August	143	143	86	112	105	118
September	137	143	116	114	129	116
October	142	140	150	115	141	120
November	152	141	153	122	130	118
December	145	145	85	116	96	115
1975 January	138	137	101	119	103	124
February	134	136	121	123	125	122
March	135	139	124	129	120	119
April	147	146	134	111	117	106
May	166	148	145	119	108	114
June	164	149	115	124	113	114
July	148	148	86	115	112	117
August	135	142	86	111	106	119
September	132	145	126	125	131	118
October	135	140	155	118	135	115
November	145	140	139	110	121	111
December	143	150	91	124	93	111
1976 January p	135	134	98	116	107	128
February p	134	137	120	122	122	118

Overseas trade analysed in terms of industries: 1975

The following table presents, for the year 1975, an analysis of United Kingdom overseas trade expressed in terms of industries (as defined by the Standard Industrial Classification), in contrast to the standard Overseas Trade Statistics classification. In this analysis every commodity heading in the trade statistics has been reclassified according to the industry of which the commodity is the principal product. This series of statistics, derived from the basic material of the overseas trade statistics, was first presented in an article in the February 1975 issue of *Economic Trends*. The article discussed the uses and limitations of this alternative form of presenting trade data together with figures for the year 1970 to 1973. In November of last year the first Business Monitor on this subject (M 10) extended the series to the year 1974. New information for 1975 will be published in a further Business Monitor in the near future and will cover the six years from 1970 to 1975. Information will be given for 132 separate industries (MLHs), grouped under 20 Industrial Orders, figures for which are given in the summary table below.

Imports are valued cif and exports fob — £ million current prices

SIC Order No.	Industry	Imports	Exports
I	Agriculture, forestry and fishing	2,253.6	308.0
II	Mining and quarrying	3,902.6	132.2
III	Food, drink and tobacco	2,768.3	1,258.3
IV	Coal and petroleum products	813.4	741.0
V	Chemicals and allied industries	1,510.1	2,224.0
VI	Metal manufacture	1,474.4	1,085.5
VII	Mechanical engineering	1,604.9	3,174.4
VIII	Instrument engineering	497.1	540.5
IX	Electrical engineering	1,419.3	1,837.8
X	Shipbuilding and marine engineering	80.3	224.9
XI	Vehicles	1,434.2	3,035.5
XII	Metal goods not elsewhere specified	1,522.7	1,650.0
XIII	Textiles	937.8	923.4
XIV	Leather, leather goods and fur	98.5	116.2
XV	Clothing and footwear	517.8	238.1
XVI	Bricks, pottery, glass, cement, etc.	170.2	331.7
XVII	Timber, furniture, etc.	661.6	109.9
XVIII	Paper, printing and publishing	1,019.3	397.9
XIX	Other manufacturing industries	374.3	537.4
XXI	Gas and electricity	1.1	0.4
	Miscellaneous*	130.0	174.0
	Residual heading	836.6	721.3
	Total UK trade	24,028.1	19,762.4

Note:
Imports and exports of certain restricted items are not included in industry totals but in the residual heading.

* The miscellaneous heading includes paintings, sculptures, antiques, stamps of philatelic interest, cinematograph film, photographic prints, etc.

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Business Monitors in the Production series and Miscellaneous series, and certain Monitors (Nos. SD 1 and SD 9) in the Service and Distributive series, are normally available by annual subscription from Her Majesty's Stationery Office, PO Box 569, London SE1 9NH. Copies of specific issues (including back issues) can be ordered by post (payable in advance) from the Library at the Business Statistics Office, Cardiff Road, Newport, Gwent NPT 1XG (tel. 0633 56111, ext. 2973; telex 497121/497122 – Answer back BSO Newport), from which a complete list of the titles of Business Monitors is available on application. Back issues of the monthly and quarterly Monitors cost 30p a copy post free. The annual Monitors are individually priced and the cost of these will be supplied on request. Exceptionally, copies can also be purchased over the counter at the Department's Statistics and Market Intelligence Library, Export House, 50 Ludgate Hill, London EC4M 7HU.

The Annual Census of Production Reports (the PA series of Monitors) and the 1971 Census of Distribution Reports (which are being published as Monitors SD 10 to SD 23, though not all are yet available) can be obtained on standing order from Her Majesty's Stationery Office, PO Box 569, London SE1 9NH, or can be purchased separately from the Government bookshops or through booksellers.

Letters to the Editor

Letters to the Editor should be addressed to the Editor, *Trade and Industry*, Room 437, 1 Victoria Street, London SW1H 0ET, and *not* to HMSO.

Footwear industry: orders, deliveries and stocks

In the three months ended March 1976 deliveries were estimated to be 7 per cent lower, on a seasonally adjusted pairage basis, than in the three months ended December 1975. Net new orders were 15 per cent lower than in the previous three months, while at the end of March orders on hand were 3 per cent down on the December 1975 level. The index of output in the three months ended March 1976 was 4 per cent lower than in the three months ended December 1975.

A detailed breakdown of manufacturers' deliveries by type of footwear in pairage and value terms, together with figures of exports, imports, consumers' expenditure, prices and employment is published in the Business Monitor Production series under the reference PQ 450.

The index of output is calculated from the value of total sales and work done by firms classified to the footwear industry (Minimum List Heading 450 of the Standard Industrial Classification). In using the index numbers it should be borne in mind that when price increases are large, the various problems associated with constructing a constant price value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent months.

The data on pairage and value relate to complete footwear only sold by manufacturers, classified to MLH 450 and to other industries (eg rubber) in the SIC, employing 25 or more persons.

Index of output: Orders on hand, net new orders, deliveries and stocks of complete footwear

Monthly averages or monthly totals

	Index of output 1970 = 100	Orders on hand (end period)			Net new orders			Deliveries			Stocks (end period)
		Million pairs		£ million	Million pairs		£ million	Million pairs		£ million	Million pairs
1966		33.6			..			16.4			
1967		37.8			16.5			16.1			
1968	113	41.6			17.3			17.0			
1969	108	34.6			15.9			16.5			
1970	100	38.9			16.6			16.2			
1971	108	32.5		55.7	15.7			16.2		23.8	19.4
1972	104	29.5		59.6	15.2		24.8	15.4		24.5	18.5
1973	108	46.2		85.2	17.1		30.5	15.7		28.4	16.5
1974	107	44.3		79.5	14.3		30.9	14.4		31.3	18.0
1975 p	101	38.4		90.6	13.1		35.7	13.5		34.7	15.8
	Seasonally adjusted	Actual	Seasonally adjusted	Actual	Actual	Seasonally adjusted	Actual	Actual	Seasonally adjusted	Actual	Actual
1974 1st quarter	101	51.1	53.3	87.5	15.2	14.1	29.7	13.6	13.4	28.9	13.6
2nd quarter	112	51.9	50.3	95.1	14.7	14.4	32.6	14.4	15.5	30.0	19.4
3rd quarter	110	40.1	49.1	73.7	11.0	14.1	26.8	14.9	14.5	33.9	16.4
4th quarter	105	44.3	50.0	79.5	16.2	14.8	34.6	14.8	14.5	32.7	18.0
1975 1st quarter	106	35.2	38.2	62.3	11.1	10.4	30.5	14.1	14.3	36.2	18.3
2nd quarter	95	40.8	39.8	82.3	14.1	13.4	37.0	12.2	12.9	30.3	23.1
3rd quarter	101	33.6	42.9	69.2	12.0	14.9	32.5	14.3	13.8	36.8	17.4
4th quarter p	101	38.4	44.9	90.6	15.1	14.0	42.7	13.5	13.3	35.6	15.8
1976 1st quarter p	96	40.2	43.6	86.3	13.2	11.9	37.0	12.6	12.3	38.4	19.0
1975 January	112	38.1	43.1	70.7	8.1	7.8	27.5	14.3	14.7	36.3	
February	108	32.9	37.0	62.3	9.2	8.7	28.7	14.4	14.7	37.1	
March	98	35.2	38.2	62.3	16.1	14.6	35.2	13.7	13.5	35.2	
April	91	39.9	39.4	75.0	17.7	13.8	44.5	13.0	12.6	31.8	
May	90	43.6	40.3	87.8	14.7	13.0	39.9	11.0	12.1	27.2	
June	104	40.8	39.8	82.3	9.8	13.5	26.5	12.7	14.0	32.0	
July	104	34.5	37.1	68.1	7.8	11.1	23.3	14.0	13.8	37.5	
August	96	33.5	40.1	66.8	11.5	16.7	29.7	12.5	13.7	31.0	
September	103	33.6	42.9	69.3	16.6	16.9	44.5	16.5	14.0	42.0	
October p	102	38.1	45.2	86.0	20.8	15.6	58.9	16.3	13.3	42.2	
November p	99	38.4	43.5	91.5	13.7	11.6	40.0	13.4	13.3	34.5	
December p	101	38.4	44.9	90.6	10.8	14.6	29.3	10.9	13.2	30.2	
1976 January p	103	36.7	42.3	85.2	10.7	10.7	31.0	12.4	13.4	36.3	
February p	97	37.7	42.4	86.3	13.3	12.6	39.0	12.2	12.4	37.9	
March p	89	40.2	43.6	86.3	15.6	12.4	41.1	13.1	11.2	41.2	

p = Provisional

Steel consumption and stocks in the first quarter of 1976

Seasonally adjusted estimates of aggregate consumption, deliveries and stocks of finished steel by type in the first quarter of 1976 are given in Table 1, with a detailed analysis of stocks in Table 5. Estimates of consumption and stocks, by industry, are given in Tables 2, 3 and 4.

Consumption by industry: Table 2

The aggregate consumption of steel increased by 8 per cent over the previous quarter and at 4.07 million tonnes was the highest since the first quarter of 1975. This rise reflects increases by all industries with the exception of the coalmining, railway and electrical engineering industries, in each of which slight decreases occurred.

Stocks by industry: Table 3

Consumers stock levels continued to fall, being nearly 12 per cent lower than those at the end of the first quarter, 1975. The fall was reflected by most industries; the exceptions were coalmining, railway and wire and wire manufactures, for which stocks increased. Aggregate consumers stocks are estimated to be the lowest held since the third quarter of 1973.

Stocks held by steel stockholders have fallen by nearly 11 per cent since the peak level held at the end of the first quarter of 1975.

Ratio of stocks to weekly consumption by industry: Table 4

The ratio continued to fall following the movement shown by stock changes. Shipbuilding and coalmining had the largest ratios, at 33 and 24 weeks. Hollow-ware, electrical engineering and wire and wire manufactures had the lowest at six, eight and eight weeks respectively.

Stock by type: Table 5

Compared with total stocks held at the end of the first quarter 1975, sheet decreased by 25 per cent, plate by 8 per cent, tinplate by 20 per cent and other steel products by 10 per cent. Rods and bars for reinforcement were unchanged.

TABLE 1 Consumption, deliveries and stocks of finished steel

Seasonally adjusted

	Consumption m. tonnes	Deliveries m. tonnes			Stocks at end of period m. tonnes			Ratio of stocks to weekly consumption (b)		
		From UK production to consumers and stockholders	Imports	Total to consumers (a)	Consumers	Stockholders	Total	Consumers	Stockholders	Total
1968	16.83	15.46	1.56	17.00	3.26	0.61	3.87	9.6	1.7	11.3
1969	17.78	17.14	1.18	18.28	3.77	0.63	4.40	10.8	1.9	12.7
1970	17.64	17.10	1.04	17.91	4.15	0.87	5.02	11.9	2.5	14.4
1971	16.72	14.50	1.41	16.07	3.47	0.71	4.18	11.5	2.3	13.8
1972	16.75	14.59	2.14	16.72	3.44	0.72	4.16	9.6	2.0	11.6
1973	18.45	16.80	2.51	19.45	4.44	0.58	5.02	13.2	1.8	15.0
1974	17.58	15.07	3.29	18.07	4.96	0.87	5.83	15.1	2.6	17.7
1975	15.45	12.03	3.03	15.01	4.53	0.92	5.45	14.5	2.9	17.4
1972 1st quarter	3.93	3.42	0.48	3.90	3.49	0.67	4.16	11.0	2.4	13.4
2nd quarter	4.04	3.43	0.47	3.88	3.33	0.68	4.01	10.0	2.2	12.2
3rd quarter	4.28	3.78	0.53	4.32	3.32	0.73	4.05	9.6	2.1	11.7
4th quarter	4.50	3.96	0.66	4.62	3.44	0.72	4.16	9.6	2.0	11.6
1973 1st quarter	4.67	4.15	0.65	4.80	3.57	0.73	4.30	10.6	2.2	12.8
2nd quarter	4.37	4.13	0.44	4.61	3.82	0.68	4.50	10.8	1.9	12.7
3rd quarter	4.60	4.26	0.61	4.91	4.12	0.64	4.76	11.1	1.8	12.9
4th quarter	4.81	4.26	0.81	5.13	4.44	0.58	5.02	13.2	1.8	15.0
1974 1st quarter	4.36	3.98	0.97	4.92	5.00	0.62	5.62	14.2	1.8	16.0
2nd quarter	4 59	3.93	0.82	4.62	5.06	0.75	5.81	15.5	2.3	17.8
3rd quarter	4.25	3.56	0.70	4.19	5.00	0.81	5.81	14.8	2.4	17.2
4th quarter	4.38	3.60	0.80	4.34	4.96	0.87	5.83	15.1	2.6	17.7
1975 1st quarter	4.27	3.55	0.85	4.26	4.95	1.01	5.96	17.4	3.6	21.0
2nd quarter	3.70	2.88	0.66	3.56	4.82	0.99	5.81	16.8	3.5	20.3
3rd quarter	3.71	2.76	0.74	3.56	4.67	0.93	5.60	16.1	3.2	19.3
4th quarter	3.77	2.84	0.78	3.63	4.53	0.92	5.45	14.5	2.9	17.4
1976 1st quarter	4.07	3.05	0.84	3.90	4.37	0.90	5.27	13.9	2.9	16.8

(a) Total deliveries to consumers are deliveries from UK production to consumers and stockholding merchants plus imports minus stock build by stockholding merchants.
(b) Calculated as stocks divided by weekly consumption in the following quarter, with the exception of the latest quarter when the divisor is weekly consumption in that quarter.

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TABLE 2 Consumption of finished steel by industry group

Seasonally adjusted

Million tonnes

	Coalmining	Railways	Shipbuilding	Construction	Engineering		Motors	Hollow-ware	Wire and wire manufactures	Other consuming industries
					Electrical	Mechanical				
1968	0.47	0.37	0.61	2.81	0.78	3.62	2.24	1.05	1.17	3.71
1969	0.45	0.39	0.68	2.81	0.78	3.89	2.38	1.12	1.23	4.05
1970	0.44	0.40	0.68	2.86	0.77	3.83	2.32	1.12	1.25	3.97
1971	0.52	0.37	0.69	3.13	0.74	3.06	2.30	1.23	1.12	3.56
1972	0.47	0.37	0.72	2.99	0.76	3.18	2.21	1.23	1.14	3.68
1973	0.52	0.37	0.65	3.35	0.87	3.73	2.43	1.35	1.23	3.95
1974	0.50	0.48	0.58	3.08	1.07	3.54	2.13	1.33	1.12	3.75
1975	0.52	0.54	0.66	2.53	0.84	3.29	1.65	1.09	0.96	3.37
1972 1st quarter	0.08	0.08	0.16	0.73	0.18	0.76	0.52	0.31	0.27	0.84
2nd quarter	0.13	0.09	0.19	0.71	0.19	0.76	0.53	0.28	0.28	0.88
3rd quarter	0.12	0.11	0.18	0.76	0.20	0.80	0.55	0.30	0.30	0.96
4th quarter	0.14	0.09	0.19	0.79	0.19	0.86	0.61	0.34	0.29	1.00
1973 1st quarter	0.13	0.09	0.20	0.83	0.21	0.93	0.60	0.32	0.34	1.02
2nd quarter	0.13	0.09	0.14	0.74	0.21	0.89	0.58	0.34	0.30	0.95
3rd quarter	0.13	0.09	0.15	0.86	0.23	0.95	0.63	0.33	0.29	0.94
4th quarter	0.13	0.10	0.16	0.92	0.22	0.96	0.62	0.36	0.30	1.04
1974 1st quarter	0.09	0.11	0.15	0.89	0.25	0.86	0.50	0.33	0.28	0.90
2nd quarter	0.12	0.12	0.13	0.81	0.28	0.93	0.56	0.37	0.27	1.00
3rd quarter	0.15	0.12	0.15	0.66	0.28	0.86	0.56	0.30	0.29	0.88
4th quarter	0.14	0.13	0.15	0.72	0.26	0.89	0.51	0.33	0.28	0.97
1975 1st quarter	0.14	0.15	0.18	0.71	0.22	0.92	0.48	0.30	0.27	0.90
2nd quarter	0.12	0.12	0.18	0.65	0.18	0.79	0.37	0.24	0.22	0.82
3rd quarter	0.12	0.14	0.14	0.59	0.22	0.80	0.36	0.28	0.24	0.82
4th quarter	0.14	0.13	0.16	0.58	0.22	0.78	0.44	0.27	0.23	0.83
1976 1st quarter	0.12	0.12	0.18	0.74	0.22	0.81	0.44	0.30	0.25	0.89

TABLE 3 Stocks of finished steel by industry group

Seasonally adjusted

million tonnes

	Coalmining	Railways	Shipbuilding	Construction	Engineering		Motors	Hollow-ware	Wire and wire manufactures	Other consuming industries
					Electrical	Mechanical				
1968	0.11	0.09	0.21	0.71	0.11	0.74	0.40	0.17	0.10	0.62
1969	0.11	0.10	0.28	0.88	0.12	0.86	0.43	0.18	0.10	0.71
1970	0.11	0.12	0.29	1.06	0.14	0.93	0.46	0.16	0.14	0.74
1971	0.13	0.11	0.25	0.84	0.10	0.78	0.37	0.14	0.13	0.62
1972	0.09	0.08	0.27	0.83	0.10	0.80	0.38	0.14	0.12	0.63
1973	0.14	0.09	0.34	1.11	0.15	0.92	0.50	0.19	0.14	0.86
1974	0.19	0.14	0.45	1.22	0.17	1.05	0.46	0.20	0.15	0.93
1975	0.22	0.16	0.51	1.14	0.13	0.90	0.39	0.14	0.15	0.79
1972 1st quarter	0.12	0.10	0.26	0.85	0.10	0.77	0.37	0.15	0.14	0.63
2nd quarter	0.10	0.10	0.25	0.80	0.10	0.76	0.35	0.15	0.13	0.59
3rd quarter	0.09	0.08	0.25	0.80	0.10	0.78	0.34	0.14	0.12	0.62
4th quarter	0.09	0.08	0.27	0.83	0.10	0.80	0.38	0.14	0.12	0.63
1973 1st quarter	0.11	0.09	0.26	0.87	0.11	0.82	0.40	0.15	0.11	0.65
2nd quarter	0.11	0.09	0.27	0.95	0.12	0.84	0.44	0.16	0.13	0.71
3rd quarter	0.12	0.09	0.31	1.05	0.14	0.85	0.46	0.19	0.13	0.78
4th quarter	0.14	0.09	0.34	1.11	0.15	0.92	0.50	0.19	0.14	0.86
1974 1st quarter	0.18	0.12	0.37	1.18	0.21	1.04	0.55	0.22	0.16	0.97
2nd quarter	0.20	0.13	0.42	1.23	0.20	1.07	0.49	0.19	0.17	0.96
3rd quarter	0.20	0.13	0.45	1.22	0.19	1.05	0.47	0.19	0.16	0.94
4th quarter	0.19	0.14	0.45	1.22	0.17	1.05	0.46	0.20	0.15	0.93
1975 1st quarter	0.20	0.13	0.48	1.22	0.16	1.04	0.43	0.20	0.15	0.94
2nd quarter	0.21	0.15	0.51	1.21	0.15	1.00	0.41	0.18	0.13	0.87
3rd quarter	0.22	0.16	0.52	1.20	0.13	0.93	0.41	0.14	0.14	0.82
4th quarter	0.22	0.16	0.51	1.14	0.13	0.90	0.39	0.14	0.15	0.79
1976 1st quarter	0.22	0.17	0.46	1.05	0.13	0.89	0.39	0.14	0.15	0.77

United Kingdom Mineral Statistics 1975

This review of all mineral statistics relating to the United Kingdom, is the third in a series produced annually by the Institute of Geological Sciences. It is an attempt to encompass in one source all the statistical information on production, trade and consumption of minerals and their derivatives collected by various government departments, and industrial and trade organisations. Data for England, Wales, Scotland, Northern Ireland, and individual counties are featured, and the statistics – in metric units throughout – are illustrated by numerous diagrams.

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TABLE 4 Ratio of stocks to weekly consumption by industry group

Seasonally adjusted

	Coalmining	Railways	Shipbuilding	Construction	Engineering		Motors	Hollow-ware	Wire and wire manufactures	Other consuming industries
					Electrical	Mechanical				
1968	12	14	17	14	7	10	8	8	4	8
1969	12	13	21	16	8	11	9	9	4	9
1970	10	16	22	16	9	14	10	6	6	10
1971	23	17	21	15	8	13	9	6	6	9
1972	9	11	18	13	6	11	8	6	5	8
1973	22	11	29	16	8	14	13	8	7	13
1974	17	14	38	22	9	15	12	8	7	12
1975	23	17	37	20	8	14	12	6	8	12
1972 1st quarter	12	15	18	16	7	13	9	7	7	9
2nd quarter	10	12	18	14	6	12	8	6	6	8
3rd quarter	9	12	17	13	6	12	7	5	6	8
4th quarter	9	11	18	13	6	11	8	6	5	8
1973 1st quarter	11	14	24	15	7	12	9	6	5	9
2nd quarter	11	14	23	14	7	12	9	7	6	10
3rd quarter	12	11	26	15	8	12	10	7	6	10
4th quarter	22	11	29	16	8	14	13	8	7	13
1974 1st quarter	20	12	36	19	10	15	13	8	8	13
2nd quarter	17	14	37	24	9	16	11	8	8	14
3rd quarter	18	13	38	22	10	15	12	8	7	13
4th quarter	17	12	34	22	10	15	12	9	7	14
1975 1st quarter	21	14	35	25	11	17	15	11	9	15
2nd quarter	22	14	48	26	9	16	15	8	7	14
3rd quarter	21	16	42	27	8	16	12	7	8	13
4th quarter	23	17	37	20	8	14	12	6	8	12
1976 1st quarter	24	18	33	18	8	14	12	6	8	11

See note Table 1 (b).

TABLE 5 Stocks of finished steel held by consumers and stockholders

Seasonally adjusted

million tonnes

	Sheets	Plates	Tinplate	Rods and bars for reinforcement	Other steel products	Total all products
CONSUMERS						
1971	0.42	0.67	0.14	0.14	2.10	3.47
1972	0.42	0.70	0.14	0.15	2.03	3.44
1973	0.60	0.91	0.16	0.22	2.55	4.44
1974	0.61	1.07	0.17	0.23	2.88	4.96
1975	0.41	1.05	0.12	0.23	2.72	4.53
1974 2nd quarter	0.66	1.08	0.17	0.25	2.91	5.07
3rd quarter	0.62	1.07	0.17	0.21	2.93	5.00
4th quarter	0.61	1.07	0.17	0.23	2.88	4.96
1975 1st quarter	0.55	1.09	0.19	0.23	2.89	4.95
2nd quarter	0.49	1.10	0.15	0.25	2.83	4.82
3rd quarter	0.43	1.12	0.14	0.22	2.76	4.67
4th quarter	0.41	1.05	0.12	0.23	2.72	4.53
1976 1st quarter	0.41	0.96	0.15	0.23	2.62	4.37
STOCKHOLDERS						
1971	0.21	0.09	0.02	0.01	0.38	0.71
1972	0.20	0.12	0.02	0.01	0.37	0.72
1973	0.15	0.11	0.02	0.01	0.29	0.58
1974	0.27	0.18	0.01	0.01	0.40	0.87
1975	0.23	0.24	0.01	0	0.44	0.92
1974 2nd quarter	0.25	0.14	0.02	0.01	0.33	0.75
3rd quarter	0.27	0.16	0.01	0.01	0.36	0.81
4th quarter	0.27	0.18	0.01	0.01	0.40	0.87
1975 1st quarter	0.30	0.23	0.01	0	0.47	1.01
2nd quarter	0.27	0.25	0.01	0	0.46	0.99
3rd quarter	0.24	0.24	0.01	0	0.44	0.93
4th quarter	0.23	0.24	0.01	0	0.44	0.92
1976 1st quarter	0.23	0.25	0.01	0	0.41	0.90
TOTAL						
1971	0.63	0.76	0.16	0.15	2.48	4.18
1972	0.62	0.82	0.16	0.16	2.40	4.16
1973	0.75	1.02	0.18	0.23	2.84	5.02
1974	0.88	1.25	0.18	0.24	3.28	5.83
1975	0.64	1.29	0.13	0.23	3.16	5.45
1974 2nd quarter	0.91	1.22	0.19	0.26	3.24	5.82
3rd quarter	0.89	1.23	0.18	0.22	3.29	5.81
4th quarter	0.88	1.25	0.18	0.24	3.28	5.83
1975 1st quarter	0.85	1.32	0.20	0.23	3.36	5.96
2nd quarter	0.76	1.35	0.16	0.25	3.29	5.81
3rd quarter	0.67	1.36	0.15	0.22	3.20	5.60
4th quarter	0.64	1.29	0.13	0.23	3.16	5.45
1976 1st quarter	0.64	1.21	0.16	0.23	3.03	5.27

Activity in the chemicals industry

Output

There was a further recovery in chemicals output in the first quarter of this year but the rise of 1½ per cent was a good deal less than that of the previous quarter. This tends to support the view that the sharp rise in output at the end of last year was mainly the result of an end to destocking. Output, however, has been stimulated by the buoyancy of exports which account for roughly a quarter of UK sales of chemicals. Although home demand for chemicals was still somewhat weak in the early part of the year, especially for inorganic and other general chemicals, it should strengthen in the second half of the year. With a further rise in exports, expected output is likely to show a rise of over 5 per cent in 1976 as a whole.

Trade

Chemical exports responded to the recovery in world economic activity and their volume rose very strongly by about 15 per cent in the first quarter of 1976. This continued the recovery which began in the previous quarter. There were rises in most sectors and exports of organic chemicals, which had the most ground to recover, increased especially fast. This very fast rate of increase is unlikely to be maintained but with UK exports now very competitive, largely as a result of the depreciation in sterling, further but smaller rises are expected.

The volume of imports rose by about 10 per cent in the first quarter of 1976, much the same rise as in the previous quarter. This further increase was unexpected but it is possible that it reflected in part some buying in anticipation of price rises. In fact there was no further rise in import volume in April and May taken together, and further increases this year seem unlikely, especially as import prices are rising as a result of the fall in sterling.

Prices

Output prices rose slightly faster in the first quarter of 1976 than in the previous quarter, ending the slowdown in the rate of increase which began early last year. It is possible that the constraint on prices imposed by the weakness of the market has been relaxed to some extent. Prices of materials and fuels purchased by the chemicals industry rose by 3 per cent in the first quarter, a slightly smaller rise than in the previous quarter, but it does not suggest any dramatic slowdown in material input costs. Import prices rose sharply in April and May, after showing a 2 per cent rise in the first quarter.

Capital expenditure

The volume of investment by the chemicals industry in the first quarter of 1976 was a little below the average quarterly level in 1975 when investment showed a substantial rise of 25 per cent. The first quarter level is probably more consistent with the Department of Industry's Intentions Inquiry, which indicated a fall in the volume of investment in 1976, than with the Chemical Industries Association Investment Intentions Survey (published in March) which suggested that investment would rise again in 1976.

TABLE 1 Index of production

Index numbers 1970 = 100, seasonally adjusted

MLH		1971	1972	1973	1974	1975 p	1974 2nd qtr.	1974 3rd qtr.	1974 4th qtr.	1975 1st qtr.	1975 2nd qtr.	1975 3rd qtr.	1975 4th qtr.	1976 1st qtr. p	% change last 3 months on Previous 3 months	% change last 3 months on A year earlier
271	General chemicals	100.7	104.5	119.2	134.8	114.0	136.0	140.4	131.3	120.9	105.5	108.8	120.7	123.6	2	2
271/1	Inorganic chemicals	101.1	99.2	109.2	114.8	95.7	115.4	118.8	113.7	108.1	91.8	91.0	91.8	98.5	7	−9
271/2	Organic chemicals	102.8	115.3	137.6	165.5	136.5	168.2	172.7	158.3	138.5	122.7	128.4	156.6	156.5	—	13
271/3	Other chemicals	97.8	97.7	108.9	121.3	108.1	121.2	126.8	119.2	114.6	100.6	106.1	111.3	113.2	2	−1
272	Pharmaceutical chemicals and preparations	107.0	115.7	136.4	145.9	148.4	144.0	146.6	148.3	151.8	152.1	140.4	149.2	148.0	−1	−3
273	Toilet preparations	105.4	112.9	126.1	139.2	133.7	132.2	145.8	142.6	141.1	129.5	134.4	129.9	124.5	−4	−12
274	Paint	103.0	110.1	120.9	115.4	113.5	115.6	116.5	113.0	112.0	117.9	112.7	111.4	109.5	−2	−2
275	Soap and detergents	99.1	102.5	105.8	115.4	110.2	113.1	118.4	116.3	106.1	111.6	106.7	116.3	108.4	−7	2
276/1	Synthetic resins and plastics materials	101.2	110.8	126.6	119.4	101.0	125.4	128.3	105.1	98.9	94.7	99.8	110.5	124.8	13	26
276/2	Synthetic rubber	90.5	100.0	118.2	108.7	84.1	126.0	111.3	97.4	97.8	79.9	64.9	93.9	99.2	6	1
277	Dyestuffs and pigments	97.0	106.7	112.2	118.6	98.1	124.4	118.8	104.9	105.9	91.8	93.8	100.9	104.2	3	−2
278	Fertilisers	105.5	99.5	97.3	101.1	100.1	107.5	103.2	96.7	98.5	92.8	104.4	104.6	92.2	−12	−6
279	Other chemical industries	102.1	108.6	117.4	117.5	108.5	115.0	116.6	117.0	109.7	107.9	108.4	108.1	109.2	1	—
Order V	Chemical and allied industries	102.1	108.1	121.2	127.7	115.8	128.8	131.4	123.9	119.0	112.2	112.2	119.8	121.6	2	2
	Total manufacturing industry	99.6	102.4	110.8	108.1	101.4	109.6	110.0	105.9	106.1	100.0	99.5	100.1	101.4	1	−4

TABLE 2 Sales of principal products

£ million, 1970 prices, not seasonally adjusted

MLH		1970	1971	1972	1973	1974	1975 p	1974 2nd qtr.	1974 3rd qtr.	1974 4th qtr.	1975 1st qtr.	1975 2nd qtr.	1975 3rd qtr.	1975 4th qtr. p
271	General chemicals	1,129	1,179	1,253	1,507	1,710	1,388	444	433	410	377	328	317	366
271/1	Inorganic chemicals	325	322	322	354	387	309	100	96	95	92	74	69	74
271/2	Organic chemicals	486	520	588	724	838	652	219	214	194	169	151	148	184
271/3	Other chemicals	318	337	343	429	485	427	125	123	121	116	103	100	108
272	Pharmaceutical chemicals and preparations	390	394	413	475	509	496	127	121	131	129	129	111	127
273	Toilet preparations	133	140	149	162	180	176	42	49	50	40	42	47	47
274	Paint	192	207	219	244	255	238	67	67	57	58	64	61	55
275	Soap and detergents	184	182	202	205	222	213	55	55	55	52	54	51	56
276/1	Synthetic resins and plastics materials	472	477	523	632	640	505	175	162	136	123	125	119	138
276/2	Synthetic rubber	53	48	53	69	64	49	16	14	17	13	12	10	14
277	Dyestuffs and pigments	137	133	147	152	159	134	40	40	41	36	33	31	34
278	Fertilisers	164	174	144	157	164	160	48	40	32	40	41	43	36
279	Other chemical industries	372	379	405	446	446	425	114	103	111	112	112	96	105
Order V	Chemical and allied industries	3,226	3,313	3,508	4,049	4,349	3,784	1,128	1,084	1,040	980	940	886	978

TABLE 3 Imports of products of the chemical industry

£ million cif current prices, not seasonally adjusted

MLH		1970	1971	1972	1973	1974	1975	1974 2nd qtr.	1974 3rd qtr.	1974 4th qtr.	1975 1st qtr.	1975 2nd qtr.	1975 3rd qtr.	1975 4th qtr.	1976 1st qtr.
271	General chemicals	302.9	298.1	337.9	459.5	864.8	810.8	222.6	242.2	221.2	214.7	187.8	191.4	216.9	230.7
271/1	Inorganic chemicals	70.5	68.3	74.6	96.7	155.6	163.8	35.6	41.2	46.1	42.7	42.8	40.4	37.9	51.3
271/2	Organic chemicals	160.7	147.3	160.6	236.9	506.3	396.4	139.8	140.3	122.2	116.3	92.3	84.4	103.4	121.8
271/3	Other chemicals	71.7	82.5	102.7	125.9	202.9	250.6	47.2	60.7	52.9	55.7	52.7	66.6	75.6	57.6
272	Pharmaceutical chemicals and preparations	38.4	42.2	49.1	74.3	106.5	111.4	27.4	28.7	26.1	26.1	25.0	28.9	31.4	38.5
273	Toilet preparations	5.1	6.2	9.0	15.1	21.2	25.3	5.7	5.7	4.9	5.9	6.5	6.6	6.3	6.0
274	Paint	5.3	5.9	7.3	10.0	14.9	14.0	3.7	4.2	3.8	3.2	3.1	3.4	4.3	4.5
275	Soap and detergents	5.8	9.4	12.6	14.2	25.1	19.4	6.8	7.4	6.3	5.5	4.4	4.3	5.2	5.5
276/1	Synthetic resins	109.0	107.2	129.8	183.0	321.7	232.6	77.1	97.5	71.7	51.5	53.8	58.9	68.4	87.1
276/2	Synthetic rubber	18.8	20.5	20.7	27.0	39.1	42.3	9.9	10.5	10.4	11.0	9.3	9.7	12.3	14.0
277	Dyestuffs and pigments	26.7	35.7	39.2	54.5	71.5	53.2	19.1	18.5	15.3	11.5	12.8	12.9	16.0	17.2
278	Fertilisers	23.1	25.9	32.9	35.2	57.4	55.3	13.0	15.7	16.3	17.5	13.7	12.1	12.0	17.9
279	Other chemical industries	36.5	42.3	48.6	65.5	103.2	114.5	25.8	26.7	27.8	28.9	29.9	26.7	29.0	43.6
Order V	Chemicals and allied industries	571.6	593.4	687.1	938.3	1,625.4	1,478.8	411.1	457.1	403.8	375.8	346.3	355.1	401.6	465.0

£ million, fob 1970 prices, not seasonally adjusted

MLH		1970	1971	1972	1973	1974	1975	1974 2nd qtr.	1974 3rd qtr.	1974 4th qtr.	1975 1st qtr.	1975 2nd qtr.	1975 3rd qtr.	1975 4th qtr.	1976 1st qtr.
271	General chemicals	303	290	328	377	386	336	98	104	91	82	79	84	92	95
271/1	Inorganic chemicals	71	65	68	81	82	70	20	20	22	19	17	18	17	20
271/2	Organic chemicals	161	147	165	194	191	150	51	51	44	39	36	35	40	49
271/3	Other chemicals	72	77	94	102	113	116	27	34	26	24	26	31	35	26
272	Pharmaceutical chemicals and preparations	38	39	46	60	72	57	19	19	17	15	14	14	15	17
273	Toilet preparations	5	6	9	13	14	18	4	4	3	4	5	4	4	3
274	Paint	5	6	7	8	9	8	2	3	2	2	2	2	2	2
275	Soap and detergents	6	9	12	12	17	14	5	6	4	4	4	3	3	3
276/1	Synthetic resins	109	114	144	179	195	135	46	55	40	28	32	35	40	47
276/2	Synthetic rubber	19	23	25	24	22	26	5	6	7	7	6	6	7	8
277	Dyestuffs and pigments	27	33	35	43	44	29	12	11	9	6	7	7	8	9
278	Fertilisers	23	24	28	26	26	19	6	6	6	6	5	4	4	6
279	Other chemical industries	36	41	45	50	59	53	15	15	14	13	14	13	13	20
Order V	Chemicals and allied industries	572	586	677	792	844	693	212	227	192	166	167	172	188	209

TABLE 4 Exports of products of the chemical industry

£ million, fob current prices, not seasonally adjusted

MLH		1970	1971	1972	1973	1974	1975	1974 2nd qtr.	1974 3rd qtr.	1974 4th qtr.	1975 1st qtr.	1975 2nd qtr.	1975 3rd qtr.	1975 4th qtr.	1976 1st qtr.
271	General chemicals	324.2	366.0	373.8	523.6	984.7	917.9	253.6	270.7	270.7	221.7	223.7	217.7	254.8	303.9
271/1	Inorganic chemicals	61.5	62.7	58.0	81.5	128.1	128.9	31.8	35.3	34.8	38.2	31.8	27.2	31.7	36.5
271/2	Organic chemicals	135.7	154.4	160.5	244.1	545.3	451.7	144.5	150.7	144.6	108.6	105.0	105.8	132.3	156.3
271/3	Other chemicals	127.0	148.9	155.3	198.0	311.3	337.3	77.3	84.7	91.3	74.9	86.9	84.7	90.8	110.6
272	Pharmaceutical chemicals and preparations	134.1	161.1	172.9	212.6	287.1	350.4	69.4	75.7	80.3	80.8	95.8	84.0	89.8	97.7
273	Toilet preparations	22.4	23.9	28.2	34.4	46.8	57.4	11.6	12.8	12.6	12.9	14.9	14.8	14.8	16.1
274	Paint	19.8	21.6	23.6	29.3	46.4	55.3	11.8	12.9	12.7	13.5	14.8	12.9	14.1	14.9
275	Soap and detergents	23.5	23.8	28.8	38.0	70.5	81.0	17.6	18.3	21.8	18.2	21.6	19.4	21.8	21.8
276/1	Synthetic resins	139.1	139.6	157.2	190.5	315.9	297.2	85.5	85.3	82.3	73.3	71.2	65.2	87.5	98.9
276/2	Synthetic rubber	19.8	22.2	25.7	34.3	46.6	37.8	12.7	12.0	11.0	8.9	9.4	8.0	11.5	13.1
277	Dyestuffs and pigments	53.6	58.7	79.2	107.0	162.2	137.3	45.2	41.5	35.7	34.9	32.4	31.5	38.5	37.2
278	Fertilisers	4.8	3.6	7.0	14.8	45.7	53.4	9.4	10.0	16.6	27.2	15.0	4.7	6.5	18.7
279	Other chemical industries	109.8	126.8	129.2	158.3	221.9	272.3	56.7	57.4	59.8	67.5	72.5	67.1	65.2	83.5
Order V	Chemical and allied industries	851.3	947.3	1,025.6	1,342.8	2,227.8	2,259.7	573.5	596.6	603.5	558.7	571.2	525.3	604.5	705.8

£ million, fob 1970 prices, not seasonally adjusted

MLH		1970	1971	1972	1973	1974	1975	1974 2nd qtr.	1974 3rd qtr.	1974 4th qtr.	1975 1st qtr.	1975 2nd qtr.	1975 3rd qtr.	1975 4th qtr.	1976 1st qtr.
271	General chemicals	324	356	353	461	564	422	147	147	132	103	103	102	113	136
271/1	Inorganic chemicals	61	60	53	62	63	52	18	15	15	15	12	11	13	14
271/2	Organic chemicals	136	152	156	226	292	205	76	79	63	48	46	51	59	73
271/3	Other chemicals	127	144	145	174	209	165	54	53	54	40	44	40	41	49
272	Pharmaceutical chemicals and preparations	134	155	164	196	231	232	58	60	61	58	64	55	55	61
273	Toilet preparations	22	22	25	28	28	28	7	7	7	7	7	7	7	8
274	Paint	20	21	21	23	26	27	7	7	6	7	7	6	7	6
275	Soap and detergents	24	22	26	32	42	39	11	11	12	9	10	9	10	10
276/1	Synthetic resins	139	142	165	171	179	153	49	44	42	36	35	34	47	51
276/2	Synthetic rubber	20	21	24	28	30	17	8	7	6	4	4	4	5	6
277	Dyestuffs and pigments	54	55	69	82	88	64	24	20	17	16	15	15	17	16
278	Fertilisers	5	4	7	13	24	26	4	5	10	14	8	2	2	6
279	Other chemical industries	110	130	138	149	163	151	42	41	39	41	41	36	34	41
Order V	Chemical and allied industries	852	927	991	1,183	1,375	1,157	356	348	333	294	295	270	297	340

TABLE 5 Price index numbers of output (home sales)

1970 = 100

MLH		1971	1972	1973	1974	1975 p	1974 2nd qtr.	1974 3rd qtr.	1974 4th qtr.	1975 1st qtr.	1975 2nd qtr.	1975 3rd qtr.	1975 4th qtr.	1976 1st qtr.
271/1	Inorganic chemicals	108.0	112.3	116.8	140.7	197.1	137.7	145.7	153.3	170.1	194.4	207.5	216.2	223.9
271/2	Organic chemicals	106.3	108.1	112.9	185.7	222.7	189.0	197.5	199.1	210.3	220.8	227.8	231.7	247.4
272	Pharmaceutical chemicals	110.4	107.7	112.6	137.6	183.1	130.8	139.0	154.7	169.2	178.6	189.4	195.3	187.4
272	Pharmaceutical preparations	103.6	109.1	112.3	126.9	160.7	122.8	130.0	137.8	145.8	154.3	168.7	174.0	179.7
273	Toilet preparations	108.3	118.6	124.3	136.8	164.5	134.8	138.9	144.5	152.9	159.9	170.6	173.9	182.2
274	Paint	112.4	120.6	127.5	161.9	203.6	159.5	165.8	180.7	196.0	201.6	205.3	211.5	220.0
275	Soap and synthetic detergents	103.0	112.3	123.8	162.8	185.1	160.7	168.4	176.9	181.0	182.4	187.9	188.9	200.6
276/1	Synthetic resins and plastics materials	102.6	103.8	105.6	156.4	181.8	156.7	163.9	172.1	177.0	180.0	181.9	188.3	194.1
277	Dyestuffs and pigments	111.6	115.7	122.6	141.5	174.0	138.7	144.5	151.3	159.9	168.1	181.8	187.3	198.9
Order V	Chemicals and allied industries*	108.2	113.7	118.9	152.8	188.7	150.3	158.2	167.3	177.4	186.2	192.8	198.2	206.5
	Total manufacturing industry	109.0	114.8	123.2	152.1	188.7	148.9	156.1	164.9	176.0	186.3	193.4	199.1	206.9

* This index refers only to sales outside the chemical industry, including sectors not shown above.

TABLE 6 Price index numbers of materials and fuel purchased

1970 = 100

		1971	1972	1973	1974	1975 p	1974 2nd qtr.	1974 3rd qtr.	1974 4th qtr.	1975 1st qtr.	1975 2nd qtr.	1975 3rd qtr.	1975 4th qtr.	1976 1st qtr.
Order V	Chemical and allied industries	108.8	112.2	135.9	215.4	239.1	214.1	219.3	227.3	230.9	233.5	241.0	250.8	258.8
	Total manufacturing industry	104.6	109.2	144.5	215.1	235.5	213.7	212.9	221.1	220.9	225.6	239.3	256.0	266.1

TABLE 7 Employees in employment: Great Britain

Thousands, monthly averages

MLH		1970	1971	1972	1973	1974	1975	1974 2nd qtr.	1974 3rd qtr.	1974 4th qtr.	1975 1st qtr.	1975 2nd qtr.	1975 3rd qtr.	1975 4th qtr.	1976 1st qtr.
271	General chemicals	141	143	140	135	133	135	133.5	134.7	136.2	135.9	133.5	134.8	134.5	133.8
272	Pharmaceutical chemicals and preparations	71	73	74	74	76	74	76.5	77.9	78.5	77.8	75.9	75.6	74.3	72.5
273	Toilet preparations	22	23	25	26	27	24	27.2	27.8	26.9	26.8	24.9	24.1	23.5	22.6
274	Paint	31	29	26	27	27	27	27.2	27.8	27.7	27.2	27.4	27.5	27.0	26.9
275	Soap and synthetic detergents	18	15	15	15	16	15	15.8	16.2	16.3	16.3	15.8	15.8	15.2	15.2
276	Synthetic resins and plastics materials and synthetic rubber	51	48	46	47	49	48	49.1	50.2	50.3	49.1	49.8	47.4	46.9	46.6
277	Dyestuffs and pigments	21	20	18	22	23	23	23.3	23.9	24.1	23.8	23.3	23.1	22.7	22.3
278	Fertilisers	11	11	11	11	12	12	11.6	11.7	11.8	11.8	11.7	11.8	11.8	11.8
279	Other chemical industries	75	73	68	69	68	68	67.9	68.6	68.4	67.6	67.6	67.2	66.9	66.8
Order V	Chemical and allied industries	440	435	424	425	432	425	432.1	438.9	440.3	436.1	427.9	427.0	422.6	418.6
	Total manufacturing industry	8,164	7,886	7,613	7,664	7,705	7,379	7,701.2	7,758.4	7,739.4	7,586.3	7,516.9	7,345.4	7,290.8	7,189.1

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TABLE 8 Capital expenditure £ million

	Current prices not seasonally adjusted	1970 prices, seasonally adjusted
1963	127.8	172.7
1964	162.2	214.8
1965	217.4	274.0
1966	254.3	304.8
1967	214.7	256.1
1968	223.1	256.0
1969	267.6	296.4
1970	382.3	382.3
1971	367.1	333.9
1972	281.7	240.5
1973	250.9	193.3
1974	382.2	241.2
1975	608.4	300.9
1974 1st quarter	72.3	53.9
2nd quarter	80.2	55.4
3rd quarter	92.1	60.6
4th quarter	137.6	71.3
1975 1st quarter	132.7	76.4
2nd quarter	147.3	76.0
3rd quarter	158.5	79.2
4th quarter	169.9	69.3
1976 1st quarter	153 p	71 p

p = provisional figure.

Cinema admissions and takings in March

During March, counted as a five week period, the weekly average of admissions to cinemas in Great Britain was 2.19 million and the weekly average of gross box office takings was £1.59 million. The comparable figures for March 1975 were £2.95 million and £1.65 million respectively.

Index of retail sales in Northern Ireland in April

The seasonally adjusted index of the value of retail sales in Northern Ireland for April was 2.38 (1965 = 100), 15 per cent more than in April 1975.

After allowing for price changes, the total volume of sales in April decreased by about 3 per cent compared with th ecorresponding period last year.

The seasonally adjusted index numbers of the value of sales in April and the percentage increases on a year earlier for the main groups of traders are shown below. More detailed information can be obtained from the Department of Commerce, Index of Retail Sales, 21 Linenhall Street, Belfast BT2 8BZ (tel. Belfast (0232) 28081, ext. 140).

		April 1976	
Sales by:	Sales in 1965 – £m	Seasonally adjusted value index numbers 1965 = 100	Percentage increases
All kinds of business	219	238	15
Food shops	97	267	17
Non-food shops	122	215	13
Of which:			
Clothing and footwear shops	36	198	11
Durable goods shops	21	225	6
Miscellaneous non-food shops	43	238	14
Department and general stores	22	188	22

Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 25 June 1976.
BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
			BRITISH		
Secrets Of A Super Stud	BR/E 38669/27/6/81	90	23 June	Butcher's Film Distributors Ltd.	Meadway International Productions Ltd.
Feelings	BR/E 38670/27/6/81	90	24 June	Miracle Films Ltd.	Playpont Films Ltd.
Movietone News 2455	BR/E 38363/27/6/81	8	25 June	British Movietonews Ltd.	British Movietonews Ltd.
			COMMUNITY		
Mes Petites Amoureuses	EC 38668/27/6/81	124	22 June	Gala Film Distributors Ltd.	Elite Films and ORTF, Paris
			FOREIGN		
On The Tip Of The Tongue	F 38667	76	22 June	Butcher's Film Distributors Ltd.	Produzioni Cinematografica Tarquinia, Rome
The Strongest Man In The World	F 38671	92	24 June	Walt Disney Productions Ltd.	Walt Disney Productions, California
Alfredo Alfredo	F 38672	98	24 June	Cinema International Corporation (UK)	Rizzoli Film SpA, Rome

Amendment to the Register
The registration number of the film 'Sex Rally', registered on 4 March 1976, has been amended to EC 38479/7/3/81 and the maker's name to read Colombus Productions, Paris.

Time Rates of Wages and Hours of Work

A volume of tables giving particulars of the minimum, or standard, time rates of wages for the more important industries and occupations, and of the normal weekly hours for which these rates are payable. The details given relate to the position as at April 1, 1974, but any later changes known to have come into operation are shown.

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National Food Survey household food consumption in the first quarter of 1976

The main results of the National Food Survey for the first quarter of 1976 are summarised in the accompanying tables. The estimates are derived from records provided by a sample of 2,081 households throughout Great Britain.

Average expenditure on food bought for consumption in the home (excluding sweets and soft drinks) rose by 14p (3.4 per cent) above the level of expenditure in the previous quarter, to £4.14 per person per week. This rise is less than the increase of 6.7 per cent in the level of food prices paid by housewives participating in the Survey, indicating a fall of about 3 per cent in the real value of food purchases per head. However, most of this fall was due to freezer-owning households buying less food than in the previous quarter and possibly using more from their freezers. Households without freezers (three-quarters of the whole sample) showed a fall of less than one per cent in the real value of their average food purchases per head. Compared with the first quarter of 1975, average expenditure increased by 69p (19.8 per cent) and the general level of household food prices by 21.6 per cent, implying a decrease of about one per cent in the real value of average food purchases; this overall situation being affected by the reduced purchases of potatoes in the face of considerably increased prices.

Household consumption of liquid milk rose to 4.82 pints per person per week, the same as a year earlier, and thus recovered the ground lost following the two price increases in the previous two quarters. Purchases of cheese made a partial recovery from 3.56 oz to 3.66 oz per person per week, compared with 3.90 oz a year before; in real terms, the average price continued to be lower than a year earlier. Average purchases of butter and of margarine were little changed compared with the previous quarter at 5.53 oz and 2.85 oz, respectively, but, compared with a year earlier, there was a small shift in purchases away from butter and a larger shift towards margarine, associated with a decrease in real terms in its average price. Over the year, there was also a small swing away from vegetable fats and cooking oils to the cheaper lard and compound cooking fats.

Consumption of eggs was more than fully maintained at 4.2 eggs per person per week, but demand continues to be very inelastic; in real terms, the average price was more than 10 per cent lower than a year earlier.

In real terms, the average price paid by housewives for sugar (11.6p per lb) was 33 per cent lower than the peak value recorded in the first quarter of 1975, but 49 per cent higher than in the corresponding quarter of 1974 (before the supply difficulties which arose later in that year). Household purchases in the first quarter of 1976 averaged 12.3 oz per person per week, compared with 10.1 oz a year earlier and 14.1 oz in the first quarter of 1974. Consumption of preserves at 2.29 oz was again in conformity with the trend established before the sugar supply difficulties of 1974.

In real terms, the overall average price paid by housewives for their red carcase meat in the first quarter of 1976 was at approximately the same level as in the corresponding period of 1972 before joining the EEC. Consumption was also at about the same level of 16 oz per person per week, a slight increase in consumption of beef being offset by decreases in lamb and in pork. Compared with the first quarter of 1975, the fall in beef consumption from 9.11 oz per person per week to 8.20 oz in the first quarter of 1976 does not represent any shift in consumers' underlying demand, as the earlier figure has been boosted by 0.8 oz by the beef token scheme for pensioners. The current averages of 4.73 oz for lamb and 3.11 oz for pork are enhanced by above-average bulk purchases by freezer-owning households who, while buying less than in the previous quarter, were still buying more than normal. The averages may, therefore, include an element of future consumption, so that the apparent increase in these averages compared with those of 4.18 oz and 2.77 oz, respectively, a year earlier should be discounted. Households not in possession of a freezer recorded averages in the first quarter of 1976 (4.25 oz and 2.65 oz) which were almost identical with those they recorded a year earlier. Consumption of poultry fell seasonally to 5.43 oz per person per week, slightly above the level of a year earlier, and increases over the year for sausages, some canned meats and frozen convenience meat products more than offset decreases for other meat products and cooked ham. Consumption of bacon and of offals showed no change over the year.

TABLE 1 Estimates of average household food consumption

oz per person per week (a)

	Year 1974	Year 1975	1st quarter 1975	4th quarter 1975	1st quarter 1976
Liquid milk (pints)	4.74	4.76	4.83	4.68	4.82
Other milk (eq. pints)	0.35	0.33	0.27	0.35	0.31
Cheese	3.74	3.79	3.90	3.56	3.66
Butter	5.61	5.63	5.63	5.56	5.53
Margarine	2.60	2.60	2.63	2.90	2.85
Lard and compound cooking fat	1.82	1.97	1.92	2.20	2.02
Eggs: purchases (number)	3.94	3.97	3.92	4.03	4.05
consumption (number)	4.09	4.14	4.12	4.14	4.21
Preserves	2.47	2.43	2.83	2.29	2.29
Sugar	13.03	11.29	10.08	12.75	12.27
Beef and veal	7.41	8.32	9.11	8.49	8.20
Mutton and lamb	4.11	4.25	4.18	4.14	4.73
Pork	3.20	2.73	2.77	3.08	3.11
Bacon and ham, uncooked	4.18	3.99	3.95	4.10	3.95
Bacon and ham, cooked (including canned)	0.93	1.00	0.96	0.90	0.78
Poultry and cooked chicken	5.18	5.73	5.22	6.40	5.43
Other cooked meat (not canned)	0.62	0.59	0.50	0.48	0.48
Other canned meat	2.09	2.21	2.02	2.30	2.15
Offals	1.05	1.15	1.29	1.24	1.29
Sausages, uncooked	3.50	3.22	3.07	3.56	3.35
Other meat products:					
meat pies and sausage rolls (ready-to-eat)	0.64	0.75	0.77	0.65	0.62
all others (not frozen)	2.24	2.21	2.21	2.21	2.17
Fish, fresh and processed	2.76	2.76	2.97	2.83	2.51
Canned fish	0.60	0.66	0.58	0.56	0.50
Fish and fish products, frozen	0.96	1.05	1.01	0.96	1.26
Fresh green vegetables	12.70	11.58	11.30	11.24	10.54
Tomatoes, fresh	3.74	3.87	2.15	3.36	1.97
Other fresh vegetables	10.20	9.92	11.44	11.24	11.84
Frozen vegetables	2.66	3.26	2.91	2.54	2.89
Canned tomatoes	0.94	0.98	1.11	0.93	1.16
Canned peas	2.76	2.76	2.69	2.69	2.73
Canned beans	3.58	3.83	3.48	4.32	4.19
Potatoes (excluding processed)					
purchases	41.58	41.08	46.01	45.62	34.54
consumption	45.66	43.90	49.07	48.61	36.67
Citrus fruit	4.58	4.92	6.97	3.56	6.13
Bananas	2.86	2.87	2.68	2.57	2.57
Apples	7.08	6.77	6.54	7.97	6.91
All other fresh fruit	3.27	2.95	1.51	2.01	0.99
Canned fruit	3.70	3.75	3.28	3.69	3.31
Dried fruit, nuts and fruit and nut produce	1.20	1.27	1.02	2.17	1.11
Flour	5.30	5.16	5.75	5.37	5.79
White bread	28.24	27.68	26.99	27.87	26.75
Brown, wholewheat and wholemeal bread	2.64	3.30	3.12	3.31	3.22
Other bread	2.62	2.69	2.61	2.61	3.04
Buns, scones and teacakes	0.94	1.12	1.36	1.25	1.15
Cakes and pastries	3.51	3.12	3.12	3.15	2.47
Chocolate biscuits	1.12	0.95	0.95	1.02	1.02
Other biscuits	4.51	4.64	4.36	4.74	4.40
Breakfast cereals	2.88	3.05	2.93	2.89	3.17
Oatmeal and oat products	0.53	0.50	0.60	0.67	0.63
Canned milk puddings	1.57	1.56	1.60	1.73	1.45
Tea	2.24	2.18	2.22	2.24	2.20
Instant coffee	0.51	0.50	0.52	0.51	0.52
Canned soups	3.46	2.98	3.80	3.31	4.09
Pickles and sauces	1.55	1.71	1.60	1.84	1.65

(a) Except where otherwise stated

Source: Ministry of Agriculture, Fisheries and Food

Household purchases of canned fish fell to 0.50 oz per person per week and, while purchases of frozen uncooked white fish and of frozen convenience fish products increased from 1.01 oz in the first quarter of 1975 to 1.26 oz, this increase did not fully offset the decrease in purchases of all other fish from 2.97 oz to 2.51 oz, most of which was in respect of unfilleted white fish.

The continuing shortage of fresh potatoes was reflected in the fall in household consumption to 36.7 oz per person per week compared with 49.1 oz a year earlier, and the average price of 9.7p per lb for old potatoes compared with 2.7p. Housewives bought only three-quarters of the quantity of potatoes recorded a year before but spent nearly three times as much. Because of the shortage, purchases of instant potato and of canned potato were about twice as great as a year ago at 0.17 oz and 0.31 oz, respectively, and those of frozen chips and other frozen convenience potato products were about 25 per cent greater at 0.50 oz, but purchases of crisps and other potato products were unchanged at 0.49 oz while those of cooked chips fell from 1.11 oz to 0.70 oz.

Consumption of fresh green vegetables was again rather lower than a year before, principally because of reduced supplies of cauliflower, and there were also decreases for most other fresh vegetables except carrots and other roots. Purchases of canned beans (mainly baked beans) appear to have been stimulated by the shortage of potatoes and averaged 4.19 oz compared with 3.48 oz a year before, while purchases of all other canned vegetables (excluding potatoes) remained at just over 5 oz.

Consumption of fresh fruit also continued to be lower than a year earlier, the decrease from 17.7 oz to 16.6 oz being mainly in consumption of citrus fruit. Consumption of canned fruit and of other fruit products fell seasonally but showed a slight increase over the year.

Household purchases of bread fell seasonally to 33.0 oz per person per week. This was a little higher than in the corresponding quarter of 1975, an increase in the consumption of brown and wholemeal more than compensating for a fall in white bread. Purchases of flour confectionery other than biscuits (ie cakes, pastries, buns, scones and teacakes) have been following a generally downward trend for 10 years. This decline has recently become more strongly apparent in the comparatively expensive cakes and pastries sector than in that for the cheaper buns, scones and teacakes. Household consumption of rice, stimulated perhaps by the shortage of potatoes, rose to 0.86 oz compared with 0.57 oz a year before, while consumption of those cereal items in the Survey classification which include macaroni, spaghetti and other pasta increased from 2.23 oz to 2.42 oz.

Consumption of tea, instant coffee and other hot beverages was much the same as a year earlier.

TABLE 2 Estimates of average household food expenditure

per person per week

	Year 1974	Year 1975	1st quarter 1975	4th quarter 1975	1st quarter 1976
Total household food expenditure	£3.10	£3.77	£3.46	£4.01	£4.14
	p	p	p	p	p
Liquid milk	22.88	30.47	25.80	36.08	40.19
Other milk	3.06	3.59	2.95	3.51	3.61
Cheese	8.77	10.38	9.93	10.53	11.20
Butter	7.78	9.95	9.27	10.73	11.43
Margarine	3.13	3.90	4.04	4.22	4.23
Lard and compound cooking fat	1.94	2.47	2.50	2.73	2.34
Eggs	12.31	12.54	12.02	13.41	13.56
Preserves	2.54	3.56	3.84	3.56	3.32
Sugar	5.23	9.38	8.95	9.07	8.87
Beef and veal	26.62	32.51	32.98	35.37	36.66
Mutton and lamb	11.68	13.12	12.09	12.93	15.42
Pork	9.01	9.61	8.99	11.28	11.44
Bacon and ham, uncooked	13.82	15.58	14.43	17.16	17.89
Bacon and ham, cooked (including canned)	4.58	5.44	4.86	5.27	4.51
Poultry and cooked chicken	9.16	12.24	10.61	13.87	11.93
Other cooked meat (not canned)	2.44	2.64	2.18	2.28	2.37
Other canned meat	5.38	6.18	5.53	6.56	6.22
Offals	2.73	3.22	3.53	3.50	3.54
Sausages, uncooked	6.56	6.92	6.24	8.02	7.97
Other meat products: meat pies and sausage rolls (ready-to-eat)	1.29	1.81	1.74	1.69	1.65
All others (not frozen)	5.28	6.01	5.67	6.26	6.66
Fish, fresh and processed	8.38	9.58	9.73	10.35	9.75
Canned fish	2.26	2.82	2.48	2.38	2.13
Fish and fish products, frozen	2.88	3.31	3.04	3.21	4.54
Fresh green vegetables	5.58	6.32	5.48	5.92	6.43
Tomatoes, fresh	4.23	5.31	3.98	3.54	3.80
Other fresh vegetables	5.54	6.55	6.56	6.52	7.62
Frozen vegetables	2.91	4.25	3.62	3.72	4.57
Canned tomatoes	0.87	0.97	1.11	0.91	1.11
Canned peas	1.59	2.03	1.88	2.11	2.13
Canned beans	2.56	3.14	2.83	3.52	3.56
Potatoes (excluding processed)	7.92	13.64	7.89	17.75	21.14
Citrus fruit	3.03	3.72	4.62	3.20	4.96
Bananas	2.18	2.62	2.29	2.34	2.42
Apples	4.32	5.38	5.08	5.09	5.44
All other fresh fruit	2.54	2.72	1.26	1.94	1.00
Canned fruit	3.66	4.41	3.77	4.50	4.08
Dried fruit, nuts and fruit and nut products	2.23	2.53	2.10	4.22	2.14
Flour	2.13	2.11	2.32	2.16	2.24
White bread	14.69	16.42	15.16	16.72	16.55
Brown, wholewheat and wholemeal bread	1.78	2.47	2.17	2.55	2.61
Other bread	3.14	3.66	3.35	3.76	4.14
Buns, scones and teacakes	1.36	1.85	2.14	2.07	1.88
Cakes and pastries	6.95	7.74	7.16	8.41	6.48
Chocolate biscuits	2.79	3.08	2.98	3.30	3.39
Other biscuits	5.98	8.04	7.24	8.70	7.80
Breakfast cereals	3.70	4.95	4.43	4.81	5.39
Oatmeal and oat products	0.45	0.50	0.59	0.65	0.65
Canned milk puddings	0.35	1.12	1.06	1.31	1.11
Tea	5.49	6.00	5.76	6.48	6.35
Instant coffee	3.83	4.19	4.34	4.41	5.29
Canned soups	2.26	2.62	3.13	3.04	3.76
Pickles and sauces	1.77	2.52	2.18	2.80	2.76
Other foods	23.52	29.26	25.93	30.19	32.09

Source: Ministry of Agriculture, Fisheries and Food

TABLE 3 Nutritional value of household food as a percentage of recommended intakes (a) (b)

	National averages					Households with four or more children			
	Year 1974	Year 1975	1st quarter 1975	4th quarter 1975	1st quarter 1976	Year 1974	Year 1975	Averages of the January-March quarters in the three most recent years	Averages for year ended March 1976
Energy	101	96	95	98	94	95	88	90	88
Protein	123	120	121	121	119	112	106	108	106
Calcium	192	186	186	185	182	163	155	159	153
Iron	108	105	105	108	102	95	91	94	91
Thiamin	125	122	122	122	120	125	121	121	120
Riboflavin	129	126	127	127	126	127	124	127	124
Nicotinic acid equivalent	189	185	186	189	183	185	177	181	176
Vitamin C	181	177	155	165	139	159	154	126	150
Vitamin A (retinol equivalent)	183	198	199	216	214	172	183	196	190
Vitamin D (c)	83	82	79	83	77	70	65	66	67

(a) Department of Health and Social Security. *Recommended Intakes of Nutrients for the United Kingdom*. Reports on Public Health and Medical Subjects, No. 120, HMSO, 1969.
(b) All values make allowance for wastage in the home of 10 per cent of the edible portion of food bought, and for expected losses of nutrients during cooking.
(c) The Survey does not evaluate welfare and pharmaceutical sources of this (or any other) vitamin. Furthermore, most adults need no dietary Vitamin D, since they obtain all they need from the action of sunlight on the skin.

The average intake of energy from household foods was somewhat below recommended levels, but substantial additional contributions are made by food not recorded in the Survey – especially alcoholic drinks, some snacks, and sweets and chocolates. The average intakes of all nutrients were above recommended levels, except for vitamin D, and most adults require no dietary vitamin D, as they obtain all they need from the action of sunlight on the skin. The nutritional position in larger families was broadly similar to that in the past year.

Notes

The National Food Survey, conducted on behalf of the Ministry of Agriculture, Fisheries and Food, is a continuous sampling inquiry into the domestic food consumption, expenditure and nutrition of private households in Great Britain. By obtaining information simultaneously about the quantities, cost and varieties of food purchased by a random sample of housewives, the Survey enables comparisons to be made of dietary and food expenditure patterns and of average prices actually paid for food, not only in Great Britain as a whole but also by different kinds of household. Detailed reports are published annually. The latest volume is expected to be published next week and will give information on household food consumption and expenditure in 1974.

Food supplies moving into consumption in the United Kingdom

Preliminary estimates of food supplies moving into consumption in the United Kingdom in 1975 are set out in the following table and compared with the results for 1974. First indications show increases in consumption of grain products, pulses and nuts and dairy products and decreases in total supplies of meat, eggs, potatoes and sugar. Resulting from these changes the provisional energy value of our food supplies, expressed as kilocalories per head per day, fell from 2,960 in 1974 to 2,890 in 1975.

This is mainly attributable to an estimated reduction of 11 lb per head per annum in supplies of sugar (gross) between 1974 and 1975 which accounts for a fall of over 50 kilocalories per day. The reduction in consumption of potatoes, reflecting the difficulties in supply experienced in the latter part of 1975, accounted for a further 10 kilocalories.

Overall consumption of dairy products (excluding butter) rose by 1.2 lb per head continuing the trend over the past four years. This was due mainly to increased consumption of liquid milk, a rise of 4.9 pints per head in 1975 over 1974, and cheese (up 0.6 lb per head). Consumption of evaporated, condensed and dried whole milk fell slightly but that of yoghurt remained unchanged.

Total meat supplies, expressed in terms of edible weight, fell by nearly 3 per cent in 1975 compared with 1974, from 125.5 lb per head to 121.9 lb per head. Supplies of beef (total of bone-in and bone-out expressed as bone-in equivalent) rose by 1.6 lb per head, those of mutton and lamb rose by 1.5 lb per head (against the downward trend shown over previous years), while consumption of offal rose by just over 1 lb per head to 8.7 lb per head, the highest figure since 1968.

Supplies of imported canned meats remained the same as in 1974 but consumption of pork, bacon and ham and poultry fell by 3.8 lb per head (14 per cent), 1.7 lb per head (8 per cent) and 4.4 lb per head (17 per cent) respectively.

Consumption of fish rose by 6 per cent from 17.5 lb per head in 1974 to 18.5 lb per head in 1975, the highest figure since 1970, but consumption of eggs fell by 2 per cent (equivalent to 4 eggs per head per annum).

The overall reduction in consumption of oils and fats of 2.3 lb per head was mainly influenced by a fall of 1 lb per head in edible oils and fats (including dripping, edible animal fats, cocoa butter and refined edible oils and fats), although lard (0.7 lb) and butter (0.3 lb) were also lower than in 1974.

The movement of sugar supplies measured at the wholesale level does not give an acceptable profile of consumption between 1973 and 1975 when compared with series based on usage. It is estimated that a more realistic measure is obtained by assuming that some of the additional supplies of refined sugar arriving during the supply difficulties experienced towards the end of 1974 were not consumed until 1975. The amount entering and subsequently leaving the 'pipeline' is put at some 200 thousand tons (8 lb per head). Consumption of supplements to sugar, eg honey and glucose both show an increase in 1975 over 1974. They are 0.3 lb per head (60 per cent) and 2 lb per head (13 per cent) respectively.

Supplies of fresh citrus fruit fell by 1.2 lb per head but consumption of other fresh fruit (including apples, pears, soft fruit and stone fruit) rose by 0.5 lb per head. There were also falls in supplies of canned fruit, fruit pulp, fruit juices and dried fruit resulting in a 3.8 lb per head reduction in total fruit supplies. Consumption of pulses and nuts rose by 0.2 lb per head.

In 1975, the adverse weather conditions produced a marked decrease in total supplies of potatoes and potato products of some 14 lb per head (6 per cent).

Total consumption of other vegetables also fell (by 8.7 lb per head over the period), with increases in supplies of fresh tomatoes, fresh carrots and other vegetables and decreases in supplies of imported canned tomatoes (including juice and puree), cabbage and greens and fresh legumes.

Total consumption of grain products rose by 3 per cent in 1975, nearly 5 lb per head per annum. This was almost entirely due to a rise in consumption of wheat flour of 6 lb per head to 141.7 lb – the highest figure for four years. Increased consumption of bread may have helped to compensate for the lack of potatoes. Consumption of starch and other farinaceous foods fell by 1 lb over the period, but other grain products, including rice, remained stable.

Supplies of tea, coffee and cocoa fell by 0.2, 0.1 and 0.2 lb per head respectively.

Consumption of beer rose by 3 per cent, from 201.1 to 206.5 pints per head, spirits by 2 per cent, from 4.7 to 4.8 proof pints per head but that of wine fell by 4 per cent from 11.8 pints in 1974 to 11.3 pints in 1975.

A table showing the nutrient content of the diet derived from animal and vegetable sources separately is included with these provisional estimates for the first time. These show that the protein content rose from 83.4g per head per day in 1974 to 83.6g in 1975 but there was a fall in the fat content of 4g per head per day over the period and of carbohydrate content of 10g per head per day.

These estimates are national averages and represent not what a particular individual obtains but what, on average, is available to the population as a whole. More detailed figures, with estimates of consumption of end-products, a full commentary on the results, and some nutritional analyses will be published later in the year. The methodology used to arrive at total supplies moving into human consumption is described in the notes (final paragraph).

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Notes

Estimates of food supplies moving into consumption in the United Kingdom are prepared annually by the Ministry of Agriculture, Fisheries and Food and are usually published in August or September of each year. This shortened version has been prepared to meet requests for more up-to-date statistics.

A series covering the years 1955 to 1972 was published in *Trade and Industry* vol 12, no 9, 30 August 1973 (pages 459 to 466). Revised estimates for the years 1970 to 1973 were published in *Trade and Industry* vol 16, no 10, 5 September 1974 (pages 515 to 518) and for 1971 to 1974 in *Trade and Industry* vol 21, no 2, 10 October 1975 (pages 118 to 121).

The figures in the table relate to commodities at a primary stage of distribution and represent total supplies of food from all sources, that is home production plus imports, becoming available for consumption during the year. To arrive at the total moving into human consumption in the United Kingdom, deductions are made for exports, waste and non-food uses, and account is taken of changes in measured stocks. While little information is available on changes in wholesalers' and retailers' stocks, this may affect year-to-year comparisons of non-perishable foodstuffs. In 1974 and 1975, an estimate has been included of changes in 'pipeline' stocks of sugar. The resulting totals are then divided by the mid-year population (see Section XVI) to give average consumption per head. This is the essential difference between these estimates and those of the National Food Survey Committee, whose figures represent actual quantities of food entering private households in Great Britain.

TABLE 1 Food supplies per head per annum moving into consumption in the United Kingdom

(lb per head per annum)

	Revised 1974	Provisional 1975
I. DAIRY PRODUCTS (excluding butter)		
Liquid milk	315.9	322.3
(pints per head per annum)	(245.3)	(250.2)
of which, schools and welfare milk (pints)	(5.9)	(5.7)
Cream (40 per cent fat content)	3.5	3.5
Cheese	13.0	13.6
Evaporated milk, full cream, unsweetened	4.3	4.1
Condensed milk, full cream, sweetened	0.6	0.4
Condensed milk, machine skimmed	1.8	1.7
Dried whole milk	1.1	0.7
Dried skimmed milk	2.4	3.4
Yoghurt	3.3	3.3
Milk in manufactured products not elsewhere specified	16.7	13.6
Total (converted to milk solids)	57.1	58.3
II. MEAT		
Beef – bone in	43.3	45.8
Beef – bone out (expressed as bone-in equivalent) (a)	6.0	5.1
Mutton and lamb	16.9	18.4
Pork	26.4	22.6
Offal	7.5	8.7
Canned meat (imported)	6.9	6.9
Bacon and ham	20.9	19.2
Poultry	25.6	21.2
Game and rabbits	0.5	0.4
Total (converted to edible weight)	125.5	121.9
III. FISH		
Fresh, frozen and cured (wet fillet equivalent)	14.0	14.7
Shell fish, fresh and frozen (edible weight)	1.3	1.3
Canned fish (imported)	2.2	2.5
Total (edible weight)	17.5	18.5
IV. EGGS		
Shell eggs (number)	240	236
Egg products (equivalent number of eggs)	16	16
Total	256	252
V. OILS AND FATS (visible)		
Butter	18.8	18.5
Margarine (gross)	10.9	10.9
(net) (b)	9.6	9.3
Lard and compound cooking fat	13.4	12.7
Other edible oils and fats	13.2	12.1
Total (converted to fat content)	50.2	47.9
VI. SUGAR AND SYRUPS		
Sugar refined (c) (i) (gross)	105.5	94.2
(ii)	100.8	89.5
(iii) (net)	96.7	86.0
Honey	0.5	0.8
Glucose	15.4	17.4
Total (sugar content) (gross)	119.1	109.8
(net)	110.0	101.4
VII. FRUIT		
Fresh citrus fruit	20.8	19.6
Other fresh fruit	49.5	50.0
Canned fruit	15.5	14.9
Imported fruit juices (in natural strength)	9.0	8.2
Imported fruit pulp	1.6	1.5
Imported dried fruit	4.8	4.5
Total (converted to fresh equivalent)	121.0	117.2
VIII. PULSES AND NUTS		
Dried pulses (d)	6.2	6.7
Shelled nuts and soya flour	5.0	4.8
Total	11.2	11.4

(lb per head per annum)

	Revised 1974	Provisional 1975
IX. POTATOES AND POTATO PRODUCTS (e)	218.7	204.8
X. OTHER VEGETABLES		
Fresh tomatoes	12.6	13.0
Imported canned tomatoes (incl juice and puree)	9.8	6.4
Cabbage and greens	34.5	32.3
Leafy salads	4.5	4.4
Fresh carrots	11.5	12.9
Fresh legumes	25.4	23.5
Other fresh vegetables	30.4	30.9
Other canned vegetables (f)	10.0	9.4
Total (converted to fresh equivalent)	146.5	137.8
XI. GRAIN PRODUCTS		
Wheat flour	135.6	141.7
Barley products	0.3	0.4
Oat products	3.1	3.1
Rye products	0.4	0.3
Breakfast cereals	7.9	7.8
Rice	3.3	3.3
Starch and other farinaceous foods	3.7	2.6
Total	154.2	159.1
XII. TEA, COFFEE AND COCOA		
Tea	7.8	7.6
Coffee (bean equivalent) (g)	4.5	4.4
Cocoa powder	0.9	0.7
XIII. ALCOHOLIC DRINK (h)		
Spirits (proof pints) (i)	4.7	4.8
Beer (pints)	201.1	206.5
Wine (pints)	11.8	11.3
XIV. ENERGY VALUE (Kcal per head per day)		
Food (including coffee and cocoa)	2,960	2,890
Alcoholic drink	159	162
XV. NUTRIENT CONTENT (g per head per day)		
Protein:		
Animal	52.3	52.3
Vegetable	31.1	31.3
Total	83.4	83.6
Fat from all sources:		
Animal	121	117
Vegetable	12	12
Total	133	129
Carbohydrate (j):		
Animal	24	24
Vegetable	358	348
Total	382	372
XVI. POPULATION (millions)	56.02	56.04

(a) To convert from product weight to bone-in equivalent a factor of × 1.30 is used.
(b) Excluding ingredients shown as separate items elsewhere in the tables (eg butter and lard).
(c) (i) Total consumption of sugar including sugar content of imported manufactured foods;
(ii) = (i) less sugar used in production of alcoholic drinks;
(iii) = (i) less sugar used in alcoholic drinks and sugar content of products covered elsewhere in the table to provide for the calculation of calories.
(d) Includes dried beans and dried peas for canning.
(e) Raw equivalent.
(f) Excludes canned dried peas, canned dried beans (beans in tomato sauce, etc), and canned tomatoes.
(g) Including coffee extracts and essences.
(h) Quantities retained for home use, based on information provided by HM Customs and Excise.
(i) Excludes medical spirit.
(j) Available carbohydrate expressed as monosaccharides.

Index to statistics and organisational information published regularly in 'Trade and Industry'

A = annually M = monthly Q = quarterly 6M = every six months.

Title	Last published
Air transport: trade by air (6M)	28 Nov. 1975
Balance of payments:	
current account (M)	18 June 1976
trends in invisible transactions	16 Apr. 1976
(*see also* Overseas trade of the UK)	
Bankruptcies *see* Insolvencies	
Business names and limited partnerships (A)	30 Jan. 1975
Capital expenditure: manufacturing, distributive and service industries (Q)	11 June 1976
By regions	28 May 1976
Catering trades turnover (M)	18 June 1976
Census of production (A)	2 Apr. 1976
Chemicals industry activity (Q)	This week
Companies:	
acquisitions and mergers (Q)	14 May 1976
Liquidations *see* Insolvencies	
liquidity (Q)	11 June 1976
new registrations:	
Gt. Britain (M)	4 June 1976
N. Ireland (M)	21 May 1976
rate of return on capital	24 Oct. 1975
Construction work overseas (A)	17 Oct. 1975
EEC economic indicators	This week
Energy trends (M)	4 June 1976
Engineering industries: sales and orders (M)	25 June 1976
Film industry	
British Film Fund Agency returns (M)	4 June 1976
cinema admissions and takings (M)	This week
overseas payments and earnings (A)	8 Aug. 1975
registrations of films (A)	30 Jan. 1976
Food:	
consumption levels (6M)	This week
household consumption (Q)	This week
Footwear industry: production, orders and deliveries (M)	This week
Foreign exchange: official reserves (M)	11 June 1976
Foreign trade: industrial countries' production and trade (Q)	25 June 1976
(*see also* Overseas trade of the UK)	
Hire-purchase business (M)	11 June 1976
Industrial production:	
index numbers (M)	25 June 1976
N. Ireland index	21 Nov. 1975
Wales	16 Apr. 1976
Insolvencies (Q)	7 May 1976
Insurance companies: investments and assets (A)	22 Aug. 1975
Investment:	
book values of overseas direct investments (every 3 years)	15 Nov. 1973
industry's investment intentions (3 times a year)	11 June 1976
investment and earnings overseas (A)	25 June 1976
Man-made fibres:	
deliveries (Q)	21 May 1976
production (M)	21 May 1976
production: quarterly analysis (Q)	21 May 1976
Metal working machine tools: sales and orders (M)	21 May 1976
Motor industry:	
car and commercial vehicle production (M)	25 June 1976
estimated figures (M)	11 June 1976
motor trade turnover (Q)	21 May 1976
Office development permits (Q)	18 June 1976
Overseas trade of the UK:	
direct exporters and credit terms (A)	11 Apr. 1975
analysis of trends (Q)	18 June 1976
ten-year back run (A)	12 Mar. 1976
(*see also* Balance of payments)	
Pension funds: investments and assets (A)	22 Aug. 1975
Regional development grants (Q)	7 May 1976
Regional selective assistance monthly summary (M)	4 June 1976
Regional selective assistance: offers £10,000 or more (Q)	14 May 1976
Retail prices index (M)	25 June 1976
Retail trades:	
sales (M)	11 June 1976
provisional figures (M)	18 June 1976
sales, N. Ireland (M)	This week
stocks (M)	18 June 1976
Royalties: overseas transactions (A)	25 June 1976
Shipping: nationality of vessels in UK sea-borne trade (A)	23 Jan. 1975
Steel consumption and stocks (Q)	This week
Stocks:	
manufacturers' and distributors' quarterly figures (Q)	11 June 1976
manufacturers' stocks: monthly estimates (M)	11 June 1976
retail (M)	18 June 1976
Television: overseas payments and earnings (A)	8 Aug. 1975
Textiles:	
activity in the industry (Q)	23 Apr. 1976
carpet sales (M)	25 June 1976
cotton industry production (M)	28 May 1976
hosiery production (M)	25 June 1976
made-up clothing: orders and deliveries (M)	This week
wholesale houses' sales (M)	16 Apr. 1976
wool exports (Q)	28 May 1976
wool output (M)	28 May 1976
Tourism:	
foreign visitor arrivals (M)	19 Mar. 1976
overseas travel and tourism (Q)	9 Apr. 1976
Wholesale prices:	
average prices of selected commodities (A)	9 Apr. 1976
index numbers (M)	25 June 1976

Departmental organisations, etc.

Subjects	Last published
British commercial representations overseas	16 Apr. 1976
Customs notices of interest to exporters	4 June 1976
ECGD local offices	This week
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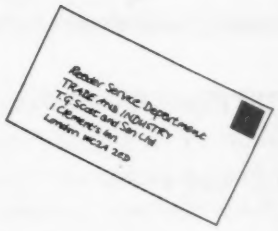

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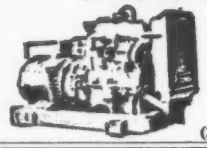

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Registered as a Newspaper Published by Her Majesty's Stationery Office, Atlantic House, Holborn Viaduct, London EC1P 1BN, for the Department of Industry, 1 Victoria Street, London SW1H 0ET. Printed by The Garden City Press Limited, Pixmore Avenue, Letchworth, Herts, SG6 1JS.

ISBN 0 11 724581 X